Independent Wealth Management Forum 2018

8.40am	Registration

8.55am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.00am Panel Discussion

How can we be different?

- Does this industry need to be shaken up and reengineered?
- What do you stand for? What do you focus on? Or have you just built a mini-private bank?
- What are the different business models? What's working?
- Is there a growing divide between local IAM's and European style IAM's? To what extent it this an issue?
- Are you genuinely client-centric? Independent and transparent?
- Are we going in circles – or is this industry moving forward?
- Generally - what's your view on technology, margin pressure and regulatory reform?
- Innovation and evolution - How will you adapt to constant changes in technology, investor behaviour and regulation?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Anthonia Hui
Head of Singapore
AlTi Tiedemann Global

Rohit Bhuta

Urs Brutsch
Managing Partner & Founder
HP Wealth Management

Nadav Lehavy
Managing Director
SandAire

Evrard Bordier
CEO and Managing Partner
Bordier & Cie

Oliver Balmelli
Head of Independent Asset Managers and International Private Banking
EFG International

9.45am

Presentation
Investor migration and the rise of the global citizen

Daphne Chandra, IMCM
Country Head, Indonesia
Henley & Partners

- Global trends and developments in investor migration
- What's driving investor migration for Asian HNWIs?
- Key considerations for HNWIs in relation to residence and citizenship planning

9.55am

Presentation
Private Syndicate Investment Platform

Jeffrey Fang
Chief Corporate Officer
CapBridge

- How trends are impacting investments today
- The funding gap in a fund raising pathway
- How efficient sharing optimises the process

10.05am

Presentation
"Follow the Flow" investing according to Fund Flow data

Franck Fayard
Director, Head of Product Engineering, Asia
Commerzbank

- A huge data pool
- The valuable information contained in fund flows
- Application to asset allocation

10.15am

Panel Discussion

What's the opportunity that the growing wealth in China and India represents to you?

- What's the role that Singapore based IAM could play in the future access to China and India wealth?
- How can domestic and offshore firms collaborate?
- What do clients want from their off-shore wealth management partners?
- Is there an opportunity to help with investments as these clients look to diversify?
- The globalising of Chinese wealth and trends to watch
- How are the different business models evolving in these onshore wealth management markets?
- Do Chinese clients have unique expectations around technology, products and service?
- Are there any real family offices in China? What do they do? What are their needs?
- Do many people view a link with China as 'not very positive'?

Chair

Michael Stanhope

Founder & Chief Executive Officer
Hubbis

Speaker

Mandeep Nalwa
Chief Executive Officer, Asia & Middle East
Taurus Wealth Advisors

James Wu
Founding Partner
Triumph Capital

Anshu Kapoor
President & Head
Nuvama Asset Management

Tuck Meng Yee
Partner and Founder
JRT Partners

11.00am	Presentation Whats the growing relevance of Gold within wealth management in Asia?

Martin Huxley
Global Head of Precious Metals
StoneX Financial Inc.

- Key findings that we discovered in the recent survey we did?
- What are the risks to avoid?
- Where is the opportunity for you?

11.10am	Refreshment & Networking
11.35am	Presentation Digital delivery of wealth management - the era of the platform?

Damian Hitchen
Chief Executive Officer, Singapore
Swissquote

- Transition of wealth management into the digital era
- Distribution / connectivity is key

11.45am	Presentation A new look at Universal Life - Guaranteed returns and Liquidity in a volatile world

David Varley
Chief Partnership Officer - Brokerage, International HuBS
Sun Life

- Using Insurance as an Asset to reduce risk to your portfolio
- Take advantage of the Wealth Structuring benefits of HNW Insurance
- Learn about how High and Low Life cover Universal Life solutions to give you guaranteed

returns and liquidity

11.55am

Presentation
THE CHARITABLE CHOICE: Powering Better Wealth Planning Through Family Unity and Shared Goals

Mark Nelligan
Chief Executive Officer
Pershing Singapore, a BNY Mellon company

- Helping families find a common purpose and their philanthropic passion
- Identifying factors that lead to successful as well as unsuccessful transfer of wealth between generations
- Developing strategies to establish a meaningful and lasting legacy

12.05pm

Presentation
How to get the right real estate investments in front of your clients

Julian Kwan
Co-Founder and CEO
InvestaX

- Previous obstacles to offering your clients real estate product
- What real estate is being shown, and why that is a problem
- The solution

12.15pm

Presentation
Update – Association of Independent Asset Managers Singapore (AIAM)

Steve Knabl
President, AIAM Singapore, Chief Operating Officer & Managing Partner, Swiss Asia
AIAM Singapore

- What progress has the Association made?
- Some key priorities for the year ahead?
- Why should independent firms join the Association?

12.20pm

Panel Discussion

Do you really want to grow your business? How will you do it?

- Why are you growing your platform? What motivates you to do it?
- What's the alignment of interest?
- Who owns it? Is it the same as working for private bank if you don't own it?
- Let’s imagine you want to add just two RMs to your platform this year – what are the challenges? Is it difficult to find someone to join you that shares your value system and embraces the unique culture?
- Can you improve processes? And can you make the connection between this and increased revenue?
- Is critical mass an issue? When do economies of scale kick in?

- When a company grows you face ballooning costs. Can you travel the road from 'small' to 'medium sized' without dying on the journey?
- If you diversify will you damage the existing value proposition?
- How can you best deal with your practice management, governance and controls?
- Digital marketing and prospecting - sharing success stories

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Steve Knabl
Chief Operating Officer & Managing Partner
Swiss-Asia Financial Services

Philipp Piaz
Partner
Finaport

Chiara Bartoletti
Chief Operating Officer
Eightstone

Simon Lints
Chief Executive Officer, Singapore
Schroders Wealth Management

1.00pm	Presentation The imminent risk of rising yields and how to cope with it

Bernd Hartmann
Head of Group Investment Research
VP Bank

- Are we already in the middle of a regime change?
- The creeping rise in risk
- The crux with bonds
- How to prepare portfolios (Solutions)

1.10pm	Lunch & Networking
1.50pm	Room B – Workshop

MiFID and its relevance for Asia

- MiFID II Transparency Regime – Opportunity or Data Overload?
- T+1 Reporting – Asia Scope
- Costs and KIDS – Clarity or Confusion?

Simon Abbott
Senior Regulatory Manager
Commerzbank

1.50pm Room A – Workshop

The growing demand for physical gold within the HNW and UHNW space in Asia

As wealth grows in Asia more of it will flow into gold and other tangible assets. What does this opportunity mean to you?

The workshop will address the following topics;

- Should an investor hold gold in a well-diversified portfolio?
- Should HNWIs be increasing their weighting in gold at this moment given where investment markets are?
- Do your clients know the difference between physical gold and paper gold?
- How can your clients gain access to the physical gold market and securely store it?
- How liquid is the physical gold market both globally and within Asia?
- Leverage – how do you apply it?

Martin Huxley
Global Head of Precious Metals
StoneX Financial Inc.

2.30pm Room B – Workshop

Residence and citizenship planning for HNWIs

- The leading Citizenship-by-Investment Programs in the Caribbean
- European Citizenship-by-Investment in Malta and Cyprus
- Attractive European Residence-by-Investment Program

Daphne Chandra, IMCM
Country Head, Indonesia
Henley & Partners

Nirbhay Handa
Group Head of Business Development
Henley & Partners

2.30pm Room A – Workshop

Delivering wealth management via a digital platform

Swissquote Bank present their market-leading digital, global-trading and custody platforms for Independent Asset-Managers

Damian Hitchen
Chief Executive Officer, Singapore
Swissquote

3.10pm Refreshment & Networking

3.30pm Panel Discussion

Are we really focused on helping our clients create long-term value?

- What is your investment process and philosophy? How do you deliver advice?
- How do clients think about risk? Does the bank profiling exercise work?
- What does the client really need? Typically, do they even know?
- Do clients invest with a proper purpose?
- What are some of the ways EAM / IAM can differentiate themselves from a typical private bank – especially from an investment product perspective?
- From a non-investment perspective – how do you service your clients and add value?

- How are you considering the next generation?
- Are charitable foundations and endowments a realistic opportunity to grow AUM?
- How are you helping your clients access interesting and unique investment solutions – for example in the private debt and private equity space?
- How do you help clients access these opportunities and how do you package these solutions?
- Do you buy private assets and real estate – how important is this? How do you access these opportunities?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Gary Tiernan
Head of Investments
Crossinvest

Noli de Pala
Chief Investment Officer
TriLake Partners

Tariq Dennison
Wealth Manager, US-Asia
GFM Asset Management

Bryan Goh
Executive Director, Chief Investment Officer
Bordier & Cie

Rainer Michael Preiss
Executive Director, Investment Advisory
Taurus Family Office

4.15pm Panel Discussion

What products do you have that you feel would be most valuable to HNW / UHNW clients in 2018?

- What funds / investment products have you got that are specifically relevant to this IAM audience?
- What's the role of structured products at time like this?
- How do clients buy and store physical gold? What's the importance of this for a typical client?
- Is buying ART an opportunity for wealth management firms?
- What are the typical mistakes people make when buying ART?
- Private vs Public - what's best?
- What strategies will enable Asian investors get higher returns, whilst been mindful of potential market challenges in 2018?
- Global equity markets have seen a strong run. Does it still have legs? Or are we reaching a terminal stage? Where do you now turn to drive long-term returns for a portfolio?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Lincoln Chow
Director, Head of Sales, Hong Kong & Singapore, Financial Institutions Marketing
Commerzbank

Nicolas Mathier
CEO
Global Precious Metals

Blake J. Noah
Managing Director, Hong Kong & Shanghai
Fine Art Asset Advisor

Xavier Burkhardt
Executive Director
Leonteq

Craig Swanger
Chief Executive Officer
Revolver Capital

5.00pm	Forum Ends

Hubbis events are –

FUN, CONSISTENT, RELEVANT, ENGAGING AND UNIQUE