Full Agenda - Independent Wealth Management Forum 2019

8.40am	**Registration**
8.55am	**Welcome Address**

Michael Stanhope
Chief Executive Officer
Hubbis

9.00am **Keynote Address**

Update – Association of Independent Asset Managers Singapore (AIAM)

Philipp Piaz
Partner
Finaport

- What progress has the Association made in 2018?
- Key priorities for the year ahead?
- What does the Association do for independent firms?

9.10am **Panel discussion**

Independent wealth management - a time of dramatic change

- What does the IAM landscape in Singapore look like today and what's the outlook for the industry?
- In comparison to ten years ago; What has changed? What has not changed?
- What are the regulatory and compliance challenges for the Independent wealth management?
- What are some of the common challenges for the IAMs/MFOs today? IT, HR, Ops, Compliance?
- How can you transition clients to the next generation of bankers?
- Are you ready for the intergenerational wealth transfer? Is the next generation willing to Bank with daddy's banker?
- What's the potential for more M&A given Schroders recent decision to buy wealth management arm of Thirdrock?
- How has the competitive environment changed?
- Is hiring top performers sustainable? What's the focus on training/hiring/grooming young talent?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel Members

Simon Lints
Chief Executive Officer, Singapore
Schroders Wealth Management

Prof Gunter Dufey
Professor Emeritus of Corporate Strategy, International Business and Finance
PIBA SA

Jaydee Lin
Chief Operating Officer & Managing Partner
Raffles Family Office

Shirley Crystal Chua
Founder and Group CEO
Golden Equator Group

Anthonia Hui
Chief Executive Officer
AL Wealth Partners

Philipp Piaz
Partner
Finaport

Oliver Balmelli
Deputy Chief Executive Officer and Head of Private Banking
EFG Bank

9.55am **Head - to - Head Q & A**

Investment Migration: Trends and Developments for HNWIs

Dominic Volek
Managing Partner, Head Southeast Asia
Henley & Partners

- Why is the Investment Migration industry booming?
- Why does H&P attend the Hubbis events?
- Where do our clients come from?
- Why do PBs/IAMs etc work with us?

10.05am **Head - to - Head Q & A**

How is technology Impacting the delivery of Wealth Management?

Damian Hitchen
CEO Singapore
Swissquote

- Transitioning wealth management into the digital era
- Distribution and connectivity is key

10.15am **Panel discussion**

Delivering investment products and advice to clients – time to re-think everything?

- Transparency, Margins, Costs and Fees – what's changing?
- What are the changing requirements of the 'platform'?
- Why do clients still prefer to go on a retrocession model vs management fee model?
- How must we tweak the investment models?
- What digital expectations do clients have?
- As transactional revenue reduces how do you compensate?

- What's the future of Discretionary and Advisory Portfolio Management?
- What's the role of technology and AI?
- Are FinTech's and Tech Giants threatening our business model?
- How independent is independent?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel Members

Damian Hitchen
CEO Singapore
Swissquote

Yai Sukonthabhund
Partner and Chief Executive Officer
Crossbridge Capital

Rohit Bhuta
Chief Executive Officer
Crossinvest

Alex Borissov
Partner
Finaport

Rachel Chen
Head of Digital Wealth (dollarDEX)
AVIVA Navigator

Will Lawton
Global Head
Quo

Edwin Lee
Chief Executive Officer
Covenant Capital

11.00am **Presentation**

The HNW Insurance Market has Changed – Here's how you win

David Varley
Chief High Net Worth Officer, Hong Kong
Sun Life Financial

- What's happening in the HNW Market?
- How HNW Brokers, Bankers, EAM can adapt to win in the new HNW Insurance Market
- What are the new Products and Trends in HNW Market
- Why should Bankers and Financial Advisers be interested in HNW Insurance

11.10am **Refreshment & Networking**

11.35am **Presentation**

State of EM: unearthing hidden gems in China and ASEAN

David Lai
Partner & Co-Chief Investment Officer
Premia Partners

- Introduction of Premia Partners and our focus on simplifying beta choices in Asia
- A review of opportunities in China new economy and ASEAN stocks, as well as implementation options
- Introduction of our plans to offer access to Asian frontier markets

11.45am **Presentation**

Why Gold, Why Now?

Martin Huxley
Global Head of Precious Metals
INTL FCStone

- Should investors hold gold as part of a diversified portfolio?
- How big is the gold market and how deep is the liquidity?
- Is gold in unchartered territory?
- How to access financial and/or physical bullion products?

11.55am **Presentation**

Leonteq: Choosing the right investment product for the current market environment

Peter Muehlsiegl
Director, Sales Structured Solutions
Leonteq Securities

- What is popular with investors at the moment?
- How investment products can complement your clients´ portfolios
- Keeping the flexibility

12.05pm **Head - to - Head Q & A**

Urs Brutsch
Managing Partner & Founder
HP Wealth Management

- What have you learnt about this industry over the last 30 years?
- How would you explain the value proposition you represent to your clients?
- How important is it to be consistent?

12.15pm **Presentation**

Is there anywhere to invest in 2019?

Andrew Hendry
Head of Distribution – Asia Pacific
Aberdeen Standard Investments

- Q4 2018 took away client's appetite for risk and they have retreated to cash
- January flows were predictably weak and a challenge to recurring revenue
- So what can advisors propose to clients to generate returns?

Andrew Hendry, Head of Asia Distribution, will share what has been successful for HNW/UHNW advisors so far.

12.25pm **Presentation**

Luxembourg Private Label Funds

Eduard von Kymmel
Chief Executive Officer, VP Fund Solutions - Luxembourg
VP Bank

- Why Luxembourg?
- Offering
- Timing & costs

12.35pm **Presentation**

An era or high returns accompanied by low volatility is coming to an end. How should investors adjust?

Larry Hatheway
Group Head of GAM Investment Solutions and Group Chief Economist
GAM

- How slower, global growth, weaker earnings and elevated stock and bond valuations warrant new approaches to portfolio construction?
- The classic 60:40 'balanced' portfolio still fit for purpose?
- What to place on identifying actual sources of diversification, as well as on minimising drawdown risk?

12.45pm **Panel discussion**

HOW can you sell insurance more effectively to HNW clients?

- How do you first address the wealth structuring and legacy questions?
- To what extent should these insurance product form part of a holistic wealth structure?
- How can you understand the insurance needs of HNW clients?
- How important is service and flexibility in the HNW Insurance market?
- How can you discover the right opportunities and have a needs-based conversation with clients? How can you follow a simple process to increase sales?
- Which are the hot HNW insurance products in the market and why?
- How can you increase the likelihood of success after introducing a client to a broker? What's your role? What's the brokers role?
- Where is the HNW market moving towards – e.g. Onshore vs Offshore?
- How do the insurers differentiate through Wealth Planning and Structuring, combined with Insurance and Trusts?
- What is the impact of Digital and Online insurance?

Chair

Mark Smallwood
Wealth Structuring and Client Advisor

Panel Members

Walter de Oude
Founder & Chief Executive Officer
Singlife

Marcus Hinkley
Head of Private Client Services - Asia
Hawksford

David Varley
Chief High Net Worth Officer, Hong Kong
Sun Life Financial

13.15pm **Lunch**

13.50pm **Room B – Workshop**

State of EM: unearthing hidden gems in China and ASEAN

2018 witnessed an aggressive EM correction on the back of USD strength, global growth and trade war concerns. While broader EM still faces some of these concerns, portions of EM markets in our backyards have strong fundamentals, low valuations, are under-invested and are now benefiting from global supply chain rebalancing and improved currency dynamics. Emerging ASEAN stocks are benefiting from USD weakness and supply chain repositioning. China new economy stocks are benefiting from an increasingly domestic and consumption driven market. Markets like Vietnam, a frontier market yet to be upgraded to EM, looks particularly interesting as many now view it as the main beneficiary of the dispute between China and the US.

David Lai
Partner & Co-Chief Investment Officer
Premia Partners

13.50pm **Room A – Workshop**

Are You Future-proofing yourself?

- Leveraging AI In Your Business
- The Human Skills That Might Help Keep You Relevant
- What's Your Strategy & Plan?

David MacDonald
Head of Learning Solutions
Hubbis

14.30pm **Room A – Workshop**

How is technology impacting the delivery of Wealth Management?

- What are the main evolutions being driven by technology?
- What are the client demands re; technology? What are the expectations?
- Is the industry, and its main players, adopting and adapting its delivery of services?

Damian Hitchen
CEO Singapore
Swissquote

14.30pm **Room B – Workshop**

Investment Migration: Trends and Developments for HNWIs

- Introduction to the Investment Migration Industry
- Citizenship-by-Investment: Travel and Settlement Freedom for HNWIs
- The world's leading Residence-by-Investment Programs

Scott Moore, IMCM
Country Head Philippines
Henley & Partners

15.10pm	**Refreshment & Networking**
15.30pm	**Panel discussion**

Navigating choppy and uncertain markets in 2019

- What are the main investment themes and the products that will be most relevant in 2019?
- How has the Investment environment changed in Asia from 2017 to 2019?
- How will you generate income in 2019?
- What's your view on global equity markets and do you think real estate (real assets) provides an interesting opportunity at this time (un-correlated)?
- What is your client's expectation on yield today?
- Managing and understanding risk — how do you estimate risk, and how does it impact your investment process?
- How do you think Asian equity market performance will be in 2019?
- What is interesting to clients in the fixed income and credit universe today?
- Is there an increasing interest in ESG?
- What's the outlook for emerging markets? Asia?
- Is the US market over heated? Are we heading to the next financial crisis in 2020?
- Is Asia warming to index and ETF products?
- What's the interest of private clients today in;
  - Alternatives
  - Private equity
  - Hedge funds
  - Infrastructure
  - Property

Chair

Bryan Henning

Panel Members

Deep Singh
Head of Investments
EFA Group

Gary Dugan
Chief Executive Officer
Purple Asset Management

Gary Tiernan
Head of Investments
Crossinvest

Richard Harris
Chief Executive Officer, Founder
Port Shelter Investment Management

Arnulfo de Pala
Chief Investment Officer
TriLake Partners

Bryan Goh

Executive Director, Chief Investment Officer
Bordier & Cie

16.15pm **Panel discussion**

Interesting and relevant Investment Solutions for YOUR clients

- Can investors look to make money via a multi asset strategy as volatility / market uncertainty increases?
- Are there any thematic / more secular equity ideas that are poised to do well? Like the environment and climate change?
- Is GOLD an interesting asset class today? What's its role in a client portfolio?
- What's the difference between physical and paper gold?
- How do you generate income today?
- What is interesting in the fixed income and credit universe today?
- How do you think Asian equity market performance will be in 2019?
- How can you managing risk in Asian equities to improve investment performance?
- Has property as an asset class lost its lustre?
- What's your view on global equity markets?
- How do you think real assets benefit a broader diversified portfolio?
- How can HNW clients invest in wine? What are the likely returns and benefits?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel Members

Alain Groshens
Co-Founder & Chief Executive Officer
SystematicEdge

Leonard Chinchay
VP of Client Relations
Prodigy Network

Sam Mudie
General Manager, Singapore
Cult Wines

George Nast
Chief Strategist, RealFuel
InvestaX

Tony Wong
Head of Intermediary Sales
CSOP Asset Management

Christophe Numa
Director
Bunker Gold & Silver

Mehak Dua
Business Development
GMO

17.15pm **Forum End**

Workshops