

INDEPENDENT WEALTH MANAGEMENT FORUM 2022

8.30am Registration

8.55am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.00am Panel Discussion - In partnership with Janus Henderson Investors

Wealth Leaders – positioning for and embracing growth in the post-pandemic world

- What is your vision for independent wealth management in Singapore in a (hopefully) Post Covid-19 world?
- How is Singapore evolving to become even more appealing to UHNW clients and Family offices?
- What growth potential lies ahead in 2022 and beyond, and where are the key opportunities for the foreseeable future?
- What is happening to the private client base in Asia, and how are clients' needs and expectations changing?
- How are leaders in this industry enhancing their value proposition, products and service offering?
- More generally, How will the competitive arena evolve in the coming several years? Are the leaders ready for those challenges?
- How are you evolving the quality and type of advice you offer to clients?

Chair

Andrew Hendry
CEO Asia
Janus Henderson Investors

Speaker

Lucie Hulme
Chief Executive Officer & Partner
TriLake Partners

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

Olivier Mivelaz
CEO & Founding Partner
Swiss-Asia Financial Services

9.30am Presentation
A Deeper Dive: The Pathway to Inclusive Investment

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

- Earlier this year, BNY Mellon Investment Management set out to explore some of the key

drivers behind the persistent gender-investment gap from the perspective of those who currently invest, those who don't, and the investment industry itself.

- This research took us around the globe interviewing 8000 women and men across 16 markets and 100 asset management firms. It deduced that if women invested at the same rate as men, there would be at least an extra USD3.22 trillion of assets under management from private individuals today.
- The answer is clear: we need to work together in making it an inclusive investment environment that is accessible for all.

View [The Pathway to Inclusive Investment](#)

9.45am

Panel Discussion - In partnership with Pershing Singapore, a BNY Mellon Company

The Pathway to Inclusive Investment

- What are the reasons there is a gender investment gap?
- How can our industry build a more inclusive investment environment?
- Panelists will share their perspective and insights into their investment management practices and how are they trying to change the gender investment gap

View [The Pathway to Inclusive Investment](#)

Chair

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

Speaker

Cheryl Chong
Co-Founder
The Social Co.

Anthonia Hui
Head of Singapore
ALTi Tiedemann Global

Tuck Meng Yee
Partner and Founder
JRT Partners

Lucy Gao-Azak
COO & Head of Wealth Management
Crossinvest

10.15am

Presentation
Is the era of the new platform here?

Rafael Weber
Head of Institutional Clients
Swissquote

- Digital delivery of wealth management
- Transitioning wealth management into the digital era

- Distribution and connectivity is key

10.30am

Panel Discussion - In partnership with Swissquote

Improving the platform, custody and processes

- Custody, execution, and advice. Will they be unbundled?
- Do you want physical service or digital execution? How are your priorities changing?
- What are traditional private banks doing wrong?
- How can platforms / partners communicate better with you? Is research important to you? Do you get too much information?
- How are you thinking about digital assets and their custody?
- How can processes be improved? For example, account opening

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Urs Brutsch
Managing Partner & Founder
HP Wealth Management

Rafael Weber
Head of Institutional Clients
Swissquote

David Doerig
Chief Operating Officer
Corecam

11.00am

Refreshment & Networking

11.30am

Presentation
War, Inflation and Biotech

Andrew Hendry
CEO Asia
Janus Henderson Investors

- Is growth still possible in the current market environment?
- Do thematics still have a place in a core portfolio?
- How can you exploit private market opportunities in Biotech?

11.45am

Presentation
International Real Estate Financing for High Net Worth Clients

Robert Chadwick
CEO
America Mortgages

- Offering Asset-backed financing as a service

- America Mortgages, the globally leader in US non -resident mortgages
- Global Partnership Program

12.00pm

Panel Discussion - In partnership with Global Mortgage Group

What can you offer your clients that is interesting and different?

- How can you differentiate yourself?
- How can you improve the value proposition?
- What do clients demand from you today?
- What products and solutions can you add to the mix that add value?
- Do you need to be more proactive and less reactive?
- What would you like to do that you cannot?
- How does regulation and compliance hamper or help you?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Donald Klip
Managing Director, Co-Founder
Global Mortgage Group

Gary Tiernan
CEO – Capital
Golden Equator Wealth

Philipp Piaz
Partner
Finaport

12.30pm

Presentation

Roadmap to building a Competitive Advantage to grow your business with Digital Assets

David Packham
Founder & CEO
Chintai

- Capitalising on digital assets with blockchain
- Developing new products to expand into new markets
- Creating new revenue streams with tokenisation

1.00pm

Forum Ends