

# INDEPENDENT WEALTH MANAGEMENT FORUM - Dubai 2023

8.30am Registration

8.55am Welcome Address

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

9.00am Panel Discussion - in partnership with Saxo Bank

Independent Wealth Managers – Defining and Refining the Proposition in the UAE

- How is the independent wealth management market developing in the UAE? How did the pandemic effect the opportunity?
- Why did it make sense to set up an office here? – perhaps in addition to Singapore, Hong Kong or Switzerland?
- Other more mature EAM markets such as Singapore & Hong Kong have an industry “Association” – do we think an industry association would be useful in Dubai / UAE?
- Who are the target clients, and what specific requirements do they have?
- What are the regulators and authorities doing to encourage the growth of the independent wealth management community in the UAE?
- How do traditional wealth managers, such as international or local Private Banks, view this development? Will they collaborate or compete?
- What is the UAE doing to increase the quality of local private banking platforms? Are we likely to see more custody here in the future rather than local PBs in Switzerland – Singapore etc?
- Will foreign private banks do more here? Are EAMs forming a larger part of the business for private banks?
- What services can independent wealth managers offer clients in UAE which are unique? For example local markets and IPO access, gold storage, art ect.
- Should there be higher hurdles to setting up an EAM/MFO?

Chair

Damian Hitchen  
Chief Executive Officer, MENA  
Saxo

Speaker

David Doerig  
Chief Operating Officer  
Corecam

Salman Haider  
Chief Executive Officer - Group Wealth Management  
Habib Bank AG Zurich

Dean Kemble  
Chief Commercial Officer  
GSB Capital

Daniel Williams

Managing Partner  
Sigma Private Office

9.30am

#### Q&A Interactive Case-Study

##### HAYAH Insurance: Building a cutting-edge digital life insurer

HAYAH Insurance, the UAE-based life insurer, recently partnered with Kidbrooke to build engaging self-service investment journeys with OutRank®, the financial simulation engine driving Hayah's new goals-based financial planning experiences.

- Join the discussion of the role of financial simulation and forecasting in delivering a superior customer experience.
- Hear about why realistic simulation and forecasting is a core aspect of generating demand for financial services, and why the quality of modelling matters.
- Learn about the practicalities of an international technology partnership, and how it can help realise a powerful vision for the future of investment services.

David Howard  
Head of Strategy and Digital Transformation  
HAYAH Insurance

Mohamed Seghir  
Chief Executive Officer  
HAYAH Insurance

Fredrik Daveus  
CEO  
Kidbrooke

9.45am

#### Panel Discussion

##### Independent Wealth Managers – Getting it right and Growing the Business

- Why set up an EAM/MFO?
- What is the nature of a sustainable platform? And the challenges of creating a successful and profitable business?
- What are the business models that are relevant to this segment?
- How can you build and retain the right talent to compete effectively?
- How are the specific requirements of clients changing? Why do they use an EAM / MFO?
- How can you find the right type of RMs to join the team? Why should they join and EAM?
- Who do you partner with for success? Platforms / Investments / Tech / Professional Services
- MFO vs SFO - How does a client choose?
- Execution and Custody - What are the choices?

Chair

Bryan Henning  
SVP, Head of International  
Eton Solutions

Speaker

Anmol Budhraj  
Founder and CEO  
Three Comma Capital Advisors

Mithun Ghosh  
Head of Client Coverage, Asia & Middle East, Group Chief Risk Officer  
Taurus Wealth Advisors

Sunita Singh-Dalal  
Partner, Private Wealth & Family Offices  
Hourani & Partners

10.15am

Presentation

How can a Wealth Protection Plan help you navigate the many challenges today?

Marc-Andre Sola  
Founder & Chairman  
1291 Group

In today's world UHNW families are exposed to many challenges that potentially destroy their wealth - global fiscal controls, international transparency, cross boarder regulations and political uncertainty – to name a few. As Professionals we face overwhelming legal and reputational risks. How can a solid Wealth Protection Plan help overcome these issues?

- What does Wealth Protection Planning mean?
- How does a great Wealth Protection Plan help clients and Professionals!
- What solutions are available and how are they different?
- What are the highlights of the most complete Wealth Protection Plan?

10.30am

Presentation

How are investors engaging China in the year of the Rabbit?

Jian Shi Cortesi  
Investment Director  
GAM Investments

- How is China emerging from Covid-19 restrictions? Will this super-charge the economy?
- Where do you find the best value this year and what are the risks to avoid?
- What is GAM's approach to maximising this opportunity?

10.45am

Presentation

Lumen Vietnam – Investment Pearl in Southeast Asia

Mario Timpanaro  
Fund Manager - Lumen Vietnam Fund  
AQUIS Capital

- China Plus One Strategy: Vietnam
- Macro Insights
- Why Vietnam? Vietnam is an excellent diversification for your portfolio

11.00am

Refreshment & Networking

11.30am

Presentation

Why does the world need Wealth advisors?

Nicholas Wright

Regional Head of Institutional Business  
Saxo

- Advisors and private wealth managers face an increasingly challenging external operating environment. What are the main challenges?
- Which focus does the industry have on helping clients understand their investing mentality and emotional state over time as an investor? What is the risk of a product-focus game?
- How can advisors become even more client-focused and create a better financial future for their clients?
- What does the modern advisor's digital toolset look like, and what should it look like? Digital communication throughout the investment life cycle, central portfolio management and AI are some of the new ways to provide investment advice or managed investment solutions.

11.45am

Presentation  
Transforming a Family Office to Reimagine the Value it Delivers

Satyen Patel  
Executive Chairman  
Eton Solutions

- Setting up a family office to deliver scalable advantage for tomorrow
- Using technology to create operational leverage and efficiencies
- Digitalising governance functions within the Family Office and across family members and key advisors

12.00pm

Panel Discussion  
Curating and Delivering Independent Advice

- What must you offer to deliver a genuinely client-first advisory offering?
- Is the client happy to pay a fee for advice, and what are the key trends emerging?
- How would you explain your value proposition? How can you differentiate yourself?
- Do you need an investment adviser or CIO to run a meaningful and effective boutique independent wealth management firm in the UAE?
- How do you manage risk, curate research and deliver the best asset allocation?
- What are the implications of regulatory initiatives in the UAE and more broadly in the region?
- Where do you get the best inputs when considering the advice that you give to clients?
- How do professional services firms help when curating 'genuine' independent advice to clients?

Chair

Philippe Amarante  
Managing Partner, Head of Dubai and Pakistan  
Henley & Partners

Speaker

Joseph El Am  
General Manager MENA  
StashAway

Alastair Glover  
Partner - Private Wealth

Trowers & Hamlins

Tim Searle  
Founder and Chairman  
Globaleye

Mehrez Kheir  
Partner and Managing Director  
Abbey Road Investment

12.30pm

Presentation  
Creating alpha with data-driven investments in private credit

Radek Jezbera  
Co-Founder & Chief Executive Officer  
Kilde

- Data-driven investing is no longer exclusive to public markets. Using the power of big data and artificial intelligence, investors can now reap large yields from private assets such as consumer and MSMEs loans.
- In fact, in a year fraught with uncertainty - 2022 - we were able to achieve an 11.6% annual return for our private credit notes along with 160% collateral cash coverage.
- By leveraging artificial intelligence software that mines loan repayment data for small loans over short tenures, it is possible to establish a reliable cash flow baseline used as collateral; creating lucrative fixed income opportunities previously only available to banks.

12.45pm

Panel Discussion - in partnership with GAM Investments

Curating winning client portfolios following a challenging year

- What are the opportunities and challenges for the year ahead?
- How are you managing risk in 2023? Is it time to take on more risk?
- What's your favourite asset class now?
- Where will inflation be at the end of the year?
- How are you generating income for clients?
- What's your view on alternative investments? Digital assets? Private Markets?
- How do you choose the right investment partners?
- How can you consistently deliver performance and differentiate your offering?
- How do you translate your view into actionable outcomes for each client based on their needs?

Chair

Philip Rosenberg  
Managing Director and Head of Distribution - Middle East  
GAM Investments

Speaker

Gary Dugan  
Chief Executive Officer  
DALMA CAPITAL - Global CEO Office

Fadi Barakat  
Chief Investment Officer  
REYL Intesa Sanpaolo

Anita Krishna Gupta

Head of Equity Strategy, CIO Office  
Emirates NBD

Jian Shi Cortesi  
Investment Director  
GAM Investments

1.15pm

Lunch & Networking

2.00pm

Forum Ends