

INDEPENDENT WEALTH MANAGEMENT FORUM - Singapore 2024

8.30am Registration

8.55am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.00am Panel Discussion

Challenges for Growth for Independent Wealth Managers in Singapore

- The cost of everything is increasing – what are the consequences of this? Is there any solution?
- Specifically - How are you dealing with the costs of compliance and the fact most banks are unable to meet the demands of account opening? Are there too many duplications of effort – between the IAM and custodian bank?
- How are you dealing with the increase in competition?
- Time for big consolidation in this Industry?
- How should we deal with ‘black sheep’? What are the business models that are relevant to this segment? Should there be higher hurdles to setting up an EAM/MFO?
- When will Singapore embrace the transparent models already in place in the West? ‘Fee only advice versus hidden charges’ - ‘Honesty and trust’ Is it time to define more clearly what the word ‘Independent’ means?
- Will Geopolitical risks eventually drive private wealth to the Middle East?
- Is there a lack of skilled manpower and good wealth managers?
- Will tighter controls and increased scrutiny kill the growth within this segment?

Chair

Andrew Hendry
CEO Asia
Janus Henderson Investors

Speaker

Shilpi Chowdhary
Chief Executive Officer, Managing Director
Lighthouse Canton

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

Jolene Tan
Executive Director - Managing Partner
SingAlliance

9.30am Presentation
Building a World Class Wealth Management Business

Sam Gillespie, CFP®

Regional Director
Dimensional Fund Advisors

- Dimensional Fund Advisors, a global leader in Systematic Investment Management with over \$650 billion in assets under management, has a rich history of innovation inspired by five Nobel Prize-winning academics since its founding in 1981.
- Their low-cost, scientifically grounded, and highly diversified investment process is utilized by over 5,000 independent wealth management firms worldwide, including top fee-based firms in Singapore.
- Highlight findings from the 2023 Global Adviser Study and discuss how the most successful High Profit Firms are utilizing Dimensional's Systematic Investment Approach.

9.45am

Panel Discussion

Charity to Philanthropy?

- What will be required to transform Singapore into a global Philanthropy Hub?
- Has the Philanthropy Tax Incentive Scheme (PTIS) for Family Offices been a success? What improvements or amendments would you suggest?
- Do clients prefer charitable donations or creating personal charitable entities?
- Do clients typically undertake any due diligence when making charitable donations? Are clients aware of the percentage use or utilization of charitable donations?
- Are clients typically interested in supporting foreign charitable causes?
- Which family generation is actively involved in charitable giving?
- Which charitable cause is most popular: religion, poverty, education, environment or others?
- Do private wealth professionals in Singapore sufficiently understand charity law and related tax and regulatory considerations?

Chair

Zac Lucas
Partner – International Private Wealth
Spencer West LLP

Speaker

Anthonia Hui
Head of Singapore
ALTi Tiedemann Global

Woon Hum Tan
Partner, Head of Trust, Asset & Wealth Management Practice
Shook Lin & Bok

David Chee
Partner
Wong Partnership

10.15am

Presentation
Empowering EAMs through Strategic Partnerships

Emmanuel Guillaume
Head of EAM Asia Pacific
Lombard Odier

- External asset managers: Asia Pacific market insights
- Charting a course

- Forging strategic alliances

10.30am

Presentation

Alger, Investing in Positive Dynamic Change and the Opportunity set ahead

Daniel Chung

Chief Executive Officer, Chief Investment Officer

Alger

- Investing in Positive Dynamic Change.
- High Unit Volume Growth.
- Positive Life Changes (Artificial Intelligence).
- Small & Mid Cap opportunities – Life Sciences and Innovation.

10.45am

Presentation

Time to Go for Bargain Hunting in China?

Rebecca Chua

Managing Partner

Premia Partners

- Are we at the bottom yet – is deep value cheap enough?
- The next China is China - what does this mean and what are the important emerging trends to monitor?
- Where will you find value and value for growth in the next 12 months?
- Which ETFs are the best implementation tools?

11.00am

Refreshment & Networking

11.30am

Panel Discussion

Driving Growth and Efficiency

- How can you attract clients who are fed up with the costs and typical service levels of financial institutions?
- How can you better use technology to improve UX for clients?
- What do you think of AI and what are its future applications?
- Are you targeting Millennials and Gen Z? What do they expect from you in regards of communication, positioning and offering?
- What is the nature of a sustainable platform? And the challenges of creating a successful and profitable business?
- Do you have a succession plan for your clients and your firm?
- How are you transforming your office to be more efficient?
- Do you use technology to make things work better, or place a bigger emphasis on quality of hires?

Chair

Bryan Henning

SVP, Head of International

Eton Solutions

Speaker

Jackson Ng
COO
Azimut

Philipp Piaz
Partner
Finaport

Aleksey Mironenko
Global Head of Investment Solutions
Leo Wealth

12.00pm

Presentation
Unlocking Sustainable Growth in Asia

Jake Chow
Portfolio Manager
CGS International Securities

- Growth Narrative & Market Outlook of Vietnam
- CGS Fullgoal Vietnam 30 Sector Cap ETF: Key Features, Fund Facts, Performance, Sector Allocation, Constituents
- Ho Chi Minh Stock Index Valuations and EPS growth
- Growth Narrative & Market Outlook of China
- CGS Fullgoal CSI 1000 ETF: Key Features, Fund Facts, Performance, Sector Allocation, Constituents

12.15pm

Presentation
Keeping pulse on your portfolio with biopharmaceutical innovation

Andrew Cox
Equity Investment Specialist
Janus Henderson Investors

- Innovation drives long-term growth, as seen by the strong performance of the technology sector. Yet the healthcare sector lagged in 2023 despite being full of innovation and growth.
- Learn why Janus Henderson believes healthcare is very well positioned today and can make a strong addition to your portfolio. We will discuss the attractive attributes of this sector, the exciting innovation we see across multiple areas of medicine, and why we consider the sector primed to perform in 2024.
- Learn about our active approach to navigating the dynamic and rapidly evolving biotech and healthcare universe.

12.30pm

Presentation
The Rise of the Empowered Retail Investor and the Effects on Wealth Managers

Graham Morrall
International Sales Director
Moventum S.C.A.

- Pandemic upheaval sparks trading boom as people chase diversified income streams
- The rise of digital investments focuses on newcomers, who consult experts less frequently

- Overlooking new retail investors today could mean missing tomorrow's valuable market opportunity
- How Wealth Managers can strategically engage emerging investors for long-term growth

12.45pm

Presentation

How Digital Wealth Management Custodians Are Disrupting the Offering for EAMs

Rafael Weber

Head of Institutional Clients

Swissquote

- What differentiates digital wealth management custodians from traditional private banks?
- What is more important, personal touch vs a platform – or both?
- Scalability of the EAM business model

1.00pm

Presentation

Private Credit: The Secret Sauce for Portfolio Returns

Radek Jezbera

Co-Founder & Chief Executive Officer

Kilde

- The case for private credit in fixed income portfolio
- Managing risks in private credit investing
- Private credit strategies for portfolio allocators

1.15pm

Lunch & Networking

2.00pm

Workshop

Investing in the World's Future: The Efficient Use of Multi-Thematics

Siham Labbas

Head of Benelux & French Speaking Regions Distribution

WisdomTree

Thematic strategies are redefining the investment landscape and offer investors exposure to Companies that will be the driving force behind the structural shifts shaping our future. In this session, we will share our key insights on the developments of the thematic space, around how to use thematic investment efficiently in your portfolio and how to build a Multi thematic portfolio that delivers exposure to a diversified basket of growing, up-and-coming companies instead of established tech megacaps.

2.30pm

Workshop

Transforming a Family Office to Reimagine the Value it Delivers

Bryan Henning

SVP, Head of International

Eton Solutions

- Setting up a family office to deliver scalable advantage for tomorrow
- Using technology to create operational leverage and efficiencies
- Transformative impact of AI on family offices

3.00pm

Presentation
AML & Transaction Monitoring

Steve Sonderegger
Executive Director
Expersoft Systems

- What are the upcoming MAS AML Guidelines for EAM's
- How can Expersoft support EAM's to comply with them?

3.15pm

Presentation
Wealth Infrastructure in a Box: The Key to Becoming Future-Proof

Srutaban Mukhopadhyay
Chief Product Officer
Valuefy

- Future-Proofing Wealth Technology with Product DNA
- Elevating Client Experience and Engagement
- Empowering Advisors Through Technology

3.30pm

Refreshment & Networking

4.00pm

Panel Discussion

Creating a Truly Independent Investment Proposition

- What are the key themes and popular investment products that resonate with clients today?
- From where do you source the most reliable information when advising clients?
- How does the trend towards specialization and product-driven sales impact portfolio management?
- Are clients moving away from discretionary portfolio management in favour of self-directed investing?
- Will confidence in the Chinese capital markets as a wealth generation venue ever return?
- Is the ESG (Environmental, Social, and Governance) industry losing its credibility?
- Given the trend towards less independent private bank platforms and limited investment choices, what opportunities does this create?
- What are the essential components of a genuinely client-first advisory service?
- Is an investment adviser or Chief Investment Officer (CIO) necessary for running an effective boutique wealth management firm?
- Do current investment products adequately meet the needs of an evolving financial and economic environment?
- Are we witnessing a shift towards ETFs and trackers and away from traditional alpha investments?
- What are your views on digital assets?
- Is it time to reconsider the traditional revenue model for External Asset Managers (EAMs)?

and clarify their value propositions to clients?

- What is your strategy for investing in private markets and fixed income, given their resurgence in popularity?
- Do clients now expect more comprehensive investment solutions in response to a continuously changing financial and economic environment?
- How could independent advice on asset allocation/model portfolios enhance your service offering?
- What research and analytical tools do you believe could enhance the service experience for your clients?

Chair

Alex Yang

Sales Director - Manager Selection & Equity Research Solutions

Morningstar

Speaker

Joyce Woo

Chief Executive, Head of Singapore

Leo Wealth

Noli de Pala

Chief Investment Officer

TriLake Partners

Arjan de Boer

Head of Markets, Investments & Structuring, Asia

Indosuez Wealth Management

Jeslin Ong

Partner, Investment Manager

MOIQ Capital

5.00pm

Forum Ends