INDIA WEALTH MANAGEMENT FORUM 2022

8.30am	Registration
8.55am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
9.00am	Panel Discussion The evolution of Indian wealth management • What is your vision for wealth management in India in a Post Covid-19 world? • How are you improving your platform and proposition? • What growth potential lies ahead? And how do you intend to maximise that opportunity? • How is the private client base evolving, and how are clients' needs and expectations changing? And their expectations from you? • What are the challenges to further growth? Chair Markus Grossmann Regional Managing Director Trident Trust Speaker Feroze Azeez Deputy CEO Anand Rathi Wealth Virendra Somwanshi Head - Wealth Management, Capital Markets and NRI Bank of Baroda Nitin Singh Managing Director & CEO Avendus Wealth Management Manish Kathuria President and Business Head, Priority & NR Banking Kotak Mahindra Bank
9.30am	Presentation Domicile diversification and alternative residence – a new asset class Nirbhay Handa Group Head of Business Development Henley & Partners • Trends for the year ahead • Domicile diversification • Discussing these concepts with your clients

9.45am	Panel Discussion - Sponsored by Henley & Partners

The Globalisation of Wealthy Indian Clients

- What are client's priorities today when considering this topic?
- How are wealth managers positioning themselves when it comes to NRI clients today?
- How are clients changing their thinking about where they live and their mobility post-Covid?
- How do centres like Dubai and Singapore factor into Indian wealth managers and client's strategy?
- How do you select partners offshore for collaboration? Or do you increasingly want to build your own platform?
- How can you help foreign investors access opportunities in India?

Chair

Dominic Volek
Group Head of Private Clients and Member of the Executive Committee
Henley & Partners

Speaker

Gautami Gavankar
CEO - Estate Planning & Trusteeship and Head - Family Office
Kotak Mahindra Group

Arpita Vinay
Managing Director and Co-Head
Centrum Wealth

Manish Jeloka
Co-Head of Products & Solutions (Advisory and Specialist Services)
Sanctum Wealth

10.15am	Panel Discussion - Sponsored by Trident Trust

The changing needs of Wealthy Indian Families

- How is the role of estate and legacy planning changing today?
- What are the onshore and offshore opportunities and challenges?
- How do clients successfully engage the next gen?
- How do wealthy Indians structure their offshore wealth in a way away that is compatible with Indian tax and legal regulations?
- What are the moving parts – and how do you co-ordinate the best solution for clients?
- What are the pitfalls and consequences of not doing it properly?

Chair

Pranav Khanna
Consultant
Trident Trust

Speaker

Bijal Ajinkya
Partner
Khaitan & Co

Shweta Shah
Head Wealth Structuring & Estate Planning
Nuvama Private

Sean Coughlan
Managing Director, Singapore
Trident Trust

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

11.30am Refreshment & Networking

11.30am Presentation
The Enhanced Role of Technology in Wealth Management

Riyaz Ladiwala
Head - Technology and Operations
Edelweiss Private Wealth

- Role of Technology in Wealth Management
- The Phygital Model and why is it here to stay
- How and where does Edelweiss fit in the above

11.45am Presentation
Wealth Management Reimagined

Banesh Prabhu
Chief Executive Officer - Intellect SEEC - Insurance, Wealth & Capital Markets
Intellect Design Arena

- Facing the new digital reality where flexibility and convenience prevail
- Progressive wealth transformation ideas and trends
- Which is better - Adopt or Adapt?

12.00pm Panel Discussion - Sponsored by Intellect Design Arena

Embracing FinTech and Digital Innovation in Wealth Management

- How do you use technology today?
- What does digitalization mean to you and your firm?
- Where are you up to in this journey?
- What is coming next in the world of digital technologies and services that will further enhance the wealth management offering, and how can those improve the proposition?
- How do wealth managers make the right decisions, firstly on what areas to focus on, and then which solutions to adopt and which technology partners to work with?
- What progress are Digital Wealth Managers making? Are they challenging traditional wealth firms?

Chair

Banesh Prabhu
Chief Executive Officer - Intellect SEEC - Insurance, Wealth & Capital Markets
Intellect Design Arena

Speaker

Anupam Guha

Head of Private Wealth Management & Equity Advisory Group
ICICI Securities

Santoshi Kittur
Chief Technology Officer
360 ONE Wealth

Alok Saigal
President & Head
Nuvama Private

12.30pm

Panel Discussion - Sponsored by Motilal Oswal

Investment Solutions and Advice – how are client expectations changing?

- What investment products and themes are interesting for HNI clients in India today?
- What developments have we seen in the delivery of advice and investment solutions?
- What are the challenges?
- Is there a growing interest in Private Markets?
- How are different tools and strategies being used in portfolios? For example, ETFs?
- What developments have there been in client's interest and ability to engage international funds?

Chair

Akhil Chaturvedi
Director & Chief Business Officer
Motilal Oswal Asset Management

Speaker

Saurabh Rungta
Senior Managing Partner & Chief Investment Officer
Nuvama Private

Sumegh Bhatia
CEO & Managing Director - India
Lighthouse Canton

Nishant Agarwal
Managing Partner and Head - Family Office
ASK Wealth Advisors

1.00pm

Presentation
Differentiated investment strategies for HNW client portfolios

Sankaranarayanan Krishnan
Quant Fund Manager (PMS & AIF schemes)
Motilal Oswal Asset Management

- How are current HNW investor portfolios positioned? What do they lack?
- The case for alternate styles of investment management in client portfolios – a comparison with global HNW portfolios
- What are the common risk factors in equity investing? Are HNW portfolios taking sufficient exposure to all of these
- Introducing 'volatility' as an asset class.

1.15pm

Lunch & Networking

2.00pm	Forum Ends