Indian Wealth Management Forum 2016

8.40am	Registration

8.55am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.00am Panel Discussion

What's your place in the wealth management industry?

- What's the right value proposition in a more complex and challenging world?
- If the big focus for many players is building wallet size – how can you grow market share in a sustainable way?
- How can you manage ever-escalating costs – across people, platform and compliance?
- Growth for private banks has been stilted – who will be the winners over the next 5 years, and why?
- What does the wealth management firm of the future look like in India? Is anyone prepared to build it?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Kanwar Vivek
Senior President - Head Wealth Management & YES First Branch Banking
YES Bank

Anshu Kapoor
President & Head
Nuvama Asset Management

Soumya Rajan
Founder & Chief Executive Officer
Waterfield Advisors

Atin Kumar Saha
Managing Director & Head Wealth Management Coverage, India
Deutsche Bank Wealth Management

Feroze Azeez
Deputy CEO
Anand Rathi Wealth

Abhijit Bhave
Managing Director and CEO
Karvy Private Wealth

Atul Singh
Managing Director and Chief Executive Officer, India

Julius Baer

9.50am

Presentation

Changes in the wealth management industry globally – and what should we expect in India

Himanshu Bhagat
Head Wealth Management
Julius Baer

- Market highlights and developments
- India outlook

10.00am

Presentation

Cognitive engagement in wealth management

Sandeep Lalwani
Executive Director – Europe and APAC
EbixCash Financial Technology

- Impact on wealth management and client engagements
- Empowering and enlightening the advisers
- Transforming business models

10.10am

Panel Discussion

Embracing the move towards an advisory model

- How is the advisory model changing in reality?
- Should the regulator create more barriers of entry to being an adviser?
- Changing the conversation between advisers and clients – turning the concepts of offering advice, creating a proper long term relationship and being needs-based into reality?
- What should the KPIs be to change the mind-set of advisers and get them thinking longer term?
- Will clients ever alter their behaviour if you sell to them in a different way?
- What can we do to better understand and respond to the needs of our clients? Especially since clients have access to so much information today?

Chair

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Speaker

Rajesh Saluja
Chief Executive Officer and Managing Director
ASK Wealth Advisors

Himanshu Kohli
Founder Partner
Client Associates

Jayant Vidwans

Director
Chaitanya Financial Consultancy

Kaushik Deva
Chief Executive Officer
Kredere Wealth Partner

Vishal Dhawan
Founder and Chief Executive Officer
Plan Ahead Wealth Advisors

Nishith Desai
Owner
Nishith Desai Associates

11.00am Refreshment & Networking

11.30am Presentation
Equities as an asset class for wealth creation

Aashish Somaiyaa
Chief Executive Officer
Motilal Oswal Asset Management

- The Motilal Oswal Asset Management investment philosophy
- The investment process

11.40am Presentation
How structured product platforms can help alleviate fear

Milind Kulkarni
Group Chief Executive Officer
FinIQ

- A 7-part fintech formula to scale-up your product distribution
- Best price execution, interactive product design, order management, suitability and compliance, what-if simulation, integrated credit checks and modern user experience

11.50am Presentation
Establishing inbound family offices in Singapore

Sunil Iyer
Managing Director, Singapore
IQ-EQ

- Structures used
- Tax & regulation considerations
- Other considerations (eg. immigration)

12.00pm Panel Discussion

How do you create ‘stickier’ staff?

- How can you make your RMs more loyal?
- How do we enhance capacity and capability in Indian wealth management?
- What is the right compensation model?
- What tools do your RMs and advisers need to help them become better equipped and informed? And therefore mean you are more likely to retain them?
- How can you make learning and professional development more interesting and effective?
- What are the conditions for learning to be interesting and effective?

Chair

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Speaker

Nick Pollard
Managing Director, Asia Pacific
CFA Institute

Pranav Joshi
Founder and Chief Executive Officer
Altamount Capital Management

Caroline Kulkarni
Co-Founder, Head of Human Resources
Sanctum Wealth

Anupam Guha
Head of Private Wealth Management & Equity Advisory Group
ICICI Securities

Bhavesh Sanghvi
Head of Wealth Management Aditya
Aditya Birla Wealth Management

12.40pm Lunch & Networking

1.25pm Panel Discussion

What’s the role of digital in Indian wealth management?

- Everyone is talking about ‘going digital’ – but what are they really doing?
- Do fintechs have a future in Indian wealth management? Do most of them have any real substance? Who will survive and thrive?
- Will this have any impact on your existing business?
- Can robo-advisers survive during volatile markets when clients need more hand-holding?
- What can you do to standardise KYC and other processes to support client acquisition?
- Are there any consequences of falling behind in the digital race?

Chair

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Founder & Chief Executive Officer
Hubbis

Speaker

Satheesh Krishnamurthy
EVP & Head - Private, Premium Banking & Third Party Products
Axis Bank

Nitin Agrawal
Co-Founder
Orowealth

Manoj Shenoy
Chief Executive - Wealth Management
L&T Financial Services

Jaideep Hansraj
Chief Executive, Head of Wealth Management & Priority Banking
Kotak Mahindra Bank

Nipun Mehta
Founder and Chief Executive Officer
BlueOcean Capital Advisors

Milind Kulkarni
Group Chief Executive Officer
FinIQ

2.10pm

Presentation
Numerix Oneview – consolidated look at orchestration, distribution and managing risk of investment products

Erdem Ozgul
Managing Director
Numerix

- Utilising innovative technologies to overcome challenges with legacy systems and processes, improve productivity and profitability

2.20pm

Presentation
A wealth manager's journey from KYC to UYC

Anshu Kapoor
President & Head
Nuvama Asset Management

- Client segmentation
- Digital disruption
- Trends and opportunities

2.30pm

Presentation
After the Panama Papers; transparency, the new minimum standard"

Richard Nunn
Regional Head, East
Jersey Finance

- The political economy

- After the Panama Papers
- Public Registers – the new global standard
- Transparency in practice
- Why Jersey?

2.40pm Refreshment & Networking

3.10pm Presentation
Removing the funds penetration blockage

Andrew Hendry
Managing Director, Asia
Westoun Advisors

- What are the challenges to greater funds penetration in Asia?
- What are the best practices among fund gatekeepers?
- How to open the funds funnel a bit wider

3.20pm Panel Discussion

Re-defining product distribution in India

- How do we create more transparency around fees? What changes will we see in how distributors get paid?
- How can we make the financial adviser channel more relevant?
- To date, performance hasn't been the main differentiator – will this change as there is more information and investor awareness?
- As an asset manager – how can you build credible distribution?
- How can financial inclusion and investor education – along with other government and industry-led initiatives – help reverse the product-pushing mentality and deepen the penetration of mutual funds?
- Do we need a self-regulatory organisation?
- How can you raise more money from overseas investors?

Chair

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Speaker

Ashish Malaviya
Head Investments & Relationship Management (Select)
IndusInd Bank

Arindam Madhuryya
Associate
Carey Olsen

Tarun Birani
Founder and Chief Executive Officer
TBNG Capital Advisors

Neeraj Choksi
Joint Managing Director

NJ Group

Sanjay Sachdev
Chairman, Chairperson, Financial Planning Standards Board
ZyFin

4.05pm Panel Discussion

What's the best investment advice you can give clients today?

- How can clients really build a more diversified portfolio?
- Where are the opportunities for our clients?
- How can we educate clients to have a long term mind-set?
- How can we make the engagement with investment solutions more 'sticky'?
- What are the best ways to get more people invested in mutual funds?
- Private funds vs mutual funds - creating more choice and outcomes for clients
- Risk management is key - but how can we get it right?
- How can we encourage customers to increase their risk tolerance?

Chair

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Founder & Chief Executive Officer
Hubbis

Speaker

Gaurav Awasthi
Head – UHNI & Family Office
ICICI Securities

Prateek Pant
Co-Founder and Head of Products and Solutions
Sanctum Wealth

Vinay Bajpai
Managing Director - Coverage & Advice
Deutsche Bank Wealth Management

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

Ashish Shanker
Managing Director & CEO
Motilal Oswal Private Wealth

Nidhi Chawla
irector, Product Advisory - Alternates
Kotak Investment Advisors

4.50pm Forum Ends