Full Agenda - Indian Wealth Management Forum 2019

8.40am	**Registration**
8.50am	**Welcome Address**

Michael Stanhope
Chief Executive Officer
Hubbis

8.55am **Panel discussion**

Private wealth management - a time of dramatic change

- What can you do to improve your value proposition?
- Is your firm attractive enough for the new wealth creators and next generation of clients?
- What does the current revenue mix of wealth managers in India look like? How is it changing?
- What changes are we seeing in client expectations and behaviour?
- Where will the continued growth come from and what are your priorities?
- What does the word ‘advice’ really mean?
- Are clients not thinking realistically abut risk and reward?
- How can you get the right people and proposition in front of the right clients?
- Revenue margins per clients will decline in the future. Is digital a way to stop revenue erosion and are you effective at monetising new digital services?
- What is the future role of the RM when banks get digital? Is the human touch less important in the future?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel Members

Anshu Kapoor
Head of Private Wealth Management
Edelweiss Private Wealth Management

Abhijit Bhave
Chief Executive Officer
Karvy Private Wealth

Feroze Azeez
Deputy Chief Executive Officer
Anand Rathi Private Wealth Management

Satheesh Krishnamurthy
Executive Vice President & Business Head - Affluent & NRI
Axis Bank

Himanshu Kohli
Founder Partner
Client Associates

9.40am **Presentation**

Investing in the Current Market Environment

Ankur Thakore
Chief Distribution Officer
L&T Investment Management

- Current market environment
- What's worrying fixed income market?
- What should one do in these times?

9.50am **Head - to - Head Q & A**

Investment Migration: Trends and Developments for HNWIs

Dominic Volek
Managing Partner, Head Southeast Asia
Henley & Partners

- Why is the Investment Migration industry booming?
- Why does Henley & Partners attend the Hubbis events?
- Where do our clients come from?
- Why do PBs/IAMs etc work with us?
- How can Henley & Partners help your HNWI clients?
- What are the pitfalls that HNWIs should be aware of concerning investment migration?

10.00am **Presentation**

Transforming Wealth Management for the Future

Abhra Roy
Head, Finacle Wealth Management Solution
Infosys Finacle

Atul Singh
Chief Executive Officer
Validus Wealth

- Redefining wealth management for 2019 and beyond
- Future Proofing your Business with a Truly Digital Platform

10.15am **Presentation**

Wealth Management as a subscription service

Anshu Kapoor
Head of Private Wealth Management
Edelweiss Private Wealth Management

- The future of wealth management, driven by client needs and regulatory impact
- Shift in wealth management business model

10.25am **Panel discussion**

Platforms and Technology - the future of private wealth and asset management?

- What does it mean today to 'add value' to a client?
- What do you need from your investment platform? How is that changing?
- What digital expectations do clients have?
- Transparency, Margins, Costs and Fees – what's changing?
- How must we tweak the investment engine? Can it be automated? How can we improve efficiency?
- How do we deliver 'funds' and investment products and 'advice' to our clients efficiently?
- What does the word 'platform' mean to you?
- How can you help wealth and asset managers with their fund selection, diversification and asset allocation?
- What's the role of AI?

Chair

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Chief Executive Officer & Founder
Hubbis

Panel Members

Kunal Bajaj
Head of Digital Wealth Management
MobiKwik

Sharad Singh
Chief Executive Officer
Valuefy

Damian Hitchen
CEO Singapore
Swissquote

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

Rahul Gaitonde
COO
Cube Wealth

Anand Moorthy
Founder & CEO
PropsAMC

Shobhit Mathur
Senior Director & Head - Advisory
Kotak Investment Advisors

11.10am **Presentation**

RM Office - 2020 Advantage

Stanzin Tsesdup
Assistant Vice President, Global Consumer Banking
Intellect Design Arena

- Possibility to Increase RMs productivity by 20%
- Possibility to reduce operational cost by 20%
- Let your system take care of compliance - 3D Compliance
- Leveraging Digital - Enhanced Outreach and contextualized experience

- Actionable insights to direct the destiny of the business

11.20am **Refreshment & Networking**

11.45am **Presentation**

2019 - Same same

Philip Story
SEO & Head of Distribution, EMEA
Investors Trust

- Did my predictions for last year come true?
- Is 2019 just going to be the same as 2018?
  - India opportunity
  - Global issues creating opportunities
- How can you help your clients via offshore, hard currency, platforms?

11.55am **Presentation**

Trends in investment pattern of High Networth Individuals (HNIs)

G Pradeepkumar
Chief Executive Officer
Union Asset Management

- HNIs becoming more influential in the mutual fund industry.
- There is visible change in their preference between equity and debt.
- Long Term Capital gains tax on debt seems to be having an impact on the holding pattern.

12.05pm **Presentation**

Cyprus Revitalised: How to Capitalize on the Island's reform?

Ioannis Ioannikiou
Legal Advisor
Casamont Cyprus

- Cyprus Investment Program
- Benefits of Cyprus when structuring your wealth
- Cyprus investment opportunities

12.15pm **Presentation**

HNW Insurance & Cricket – The "pitch" has changed……here's how you win

David Varley
Chief High Net Worth Officer, Hong Kong
Sun Life Financial

- What's happening in the HNW Market?
- How HNW Brokers, Bankers, EAM can adapt to win in the new HNW Insurance Market?
- What are the new Products and Trends in HNW Market?

- Why should Bankers and Financial Advisers be interested in HNW Insurance?

12.25pm **Panel discussion**

Curating the right solution for clients – what's thrown in the mix today?

- The Future Survival of Private Wealth Management: Mastering the Art of Gaining and Retaining Millennials. Are we REALLY ready for the transfer of wealth to the next generation?
- What are the biggest trends in wealth structuring and planning today?
- What are the most common concerns of HNW & UHNW clients?
- Finding the best advisory services and solutions – how do you maximise partnership with the right specialists?
- What specific trends are we seeing from Indian clients?
- How is the importance of International Financial Centre's changing?

Chair

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Chief Executive Officer & Founder
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Panel Members

T P Ostwal
Managing Partner
T. P. Ostwal & Associates LLP

Ashvini Chopra
Senior Vice President
Times Group

Shweta Shah
Head - Wealth Structuring & Tax
Edelweiss Private Wealth Management

Sneha Makhija
AVP, Wealth Planning Specialist
Sanctum Wealth Management

Neha Pathak
Senior Group Vice President, Head of Trust & Estate Planning
Motilal Oswal Private Wealth Management

Rishabh Shroff
Partner
Cyril Amarchand Mangaldas

Tariq Aboobaker
Managing Director
Amicorp Group

13.10pm **Lunch**

13.50pm **Room A – Workshop**

Global Citizens: Trends and Developments in Investment Migration

- Introduction to the Investment Migration Industry
- Citizenship-by-Investment: Travel and Settlement Freedom for HNWIs
- The world's leading Residence-by-Investment Programs

Dominic Volek
Managing Partner, Head Southeast Asia
Henley & Partners

Nirbhay Handa, IMCM
Director - GSAT
Henley & Partners

13.50pm **Room B – Workshop**

Rearranging the banking landscape

- Evolution of change and the challenge to existing players; Who, how and when?
- How is technology evolving the industry?
- Example of digital platforms in wealth management / private banking

Damian Hitchen
CEO Singapore
Swissquote

14.30pm **Room A – Workshop**

Accelerating Digital Wealth Management and Bancassurance

- Empowered, Digital Financial Advisory
- Digital journeys for Advisors and Clients
- A Digital Core Wealth Management engine for mid and back office operations

Abhra Roy
Head, Finacle Wealth Management Solution
Infosys Finacle

14.30pm **Room B – Workshop**

Fair Value: The Google Maps of Investing

- Fallacy of the Index PE multiple
- Fair Value approach to investing.
- Google maps vs fair value approach

Vinay Paharia
Chief Investment Officer
Union Asset Management

15.10pm **Refreshment & Networking**

15.30pm **Panel discussion**

Reinventing wealth management for Women

- Does this industry offer great prospects for women?
- Do Women make much better wealth managers and asset managers?
- How do we attract more women into this business?
- Are women in India becoming a financial force with impact?
- Do women have unique investing needs and preferences?
- Are current advisory models working for women?

Chair

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Chief Executive Officer & Founder

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Panel Members

Swetha Manot
Associate Director – Private Wealth Management
Anand Rathi Private Wealth Management

Lakshmi Iyer
Chief Investment Officer (Debt) & Head Products
Kotak Mahindra Asset Management

Ruchi Sankhe
Managing Director, Origination and Client Coverage
Waterfield Advisors

Nithya Easwaran
Managing Director
Multiples Alternate Asset Management

16.15pm **Panel discussion**

Building the skills you need for success in wealth management

- How can learning and professional development help you add value and differentiate your offering?
- Why is improving skills so important today?
- Trusted adviser – what does that even mean?
- What's critical to ensure business ownership and input in developing the best learning and development programmes?
- What must we do to improve competency assessment for leaders and advisers today?
- What works and what doesn't?
- Does anyone take learning and competency seriously in India?
- Why have we not set a higher bar?
- What's the role of the regulator?

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Panel Members

Ashish Gumashta
Managing Director & CEO, Julius Baer India
Bank Julius Baer

Ashish Shanker
Head - Investment Advisory
Motilal Oswal Private Wealth Management

Sachin Taneja
President and Head, Wealth Management
Systematix Group

Kailash Kulkarni
Chief Executive – Investment Management
L&T Mutual Fund

Anand Varadarajan
Head of Global and Alternative Asset Management

NJ Global Invest

Sagar Khandekar
Executive Director – Client Relations
Kotak Wealth Management

Gaurav Arora
Chief Investment Officer
ASK Wealth Advisors

Arpita Vinay
Whole Time Director, ED - Family Office and New Initiatives
Centrum Wealth Management

17.00pm **Forum End**

Workshops