INDONESIA WEALTH MANAGEMENT FORUM 2022

8.30am Registration

8.55am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.00am Panel Discussion

Positioning for and embracing growth in the post-pandemic world

- What is your vision for wealth management in Indonesia in a Post Covid-19 world?
- What growth potential lies ahead in 2022 and beyond, and where are the key opportunities for the foreseeable future?
- What is happening to the private client base, and how are clients' needs and expectations changing?
- How are leaders in this industry enhancing their value proposition, products and service offering?
- What are the challenges to further growth?

Chair

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

Speaker

Meru Arumdalu
Head of Wealth Management
Standard Chartered Bank

Ivan Jaya
Investment Head
Bank Commonwealth

Aliang Sumitro
Head of Wealth Management - Indonesia
Maybank

Andrew Hendry
CEO Asia
Janus Henderson Investors

9.30am Presentation
Citizenship and Residency – A look at Opportunities and Trends for the year ahead

Ian Horsburgh
Country Head of Indonesia
Henley & Partners

- Alternative residences or citizenships in times of Political Uncertainty
- Domicile diversification – a new asset class

- Real estate investment rankings for migration

9.45am	Panel Discussion

Tools and Strategies to secure your clients legacy for the next Generation

- What are some of the challenges facing wealthy families in Indonesia today?
- Curating the right solution for clients – what's thrown in the mix today?
- How are the NextGen expectations different?
- What must clients consider when moving wealth successfully to the next generation?
- How are founders, patriarchs, matriarchs and their families dealing with the estate and family business succession?
- What's the role of residency and citizenship?
- What's the role of HNW Insurance?

Chair

Scott Moore, IMCM
Managing Director
Henley & Partners

Speaker

Benjamin Szeto
Partner
1291 Group

Irene Lee
Business Development Director
British and Malayan Trustees

Zac Lucas
Partner – International Private Wealth
Spencer West LLP

10.15am	Presentation Reimagining Wealth Management

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?

10.30am	Head - to - Head Q & A

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

- How are wealth managers in Indonesia enhancing their digital capabilities?
- What are some of the trends we are likely to see in the Post-covid world?
- How does Intellect Design Arena help with the process of digital transformation?

10.45am Refreshment & Networking

11.20am Presentation
War, Inflation and What's next?

Andrew Hendry
CEO Asia
Janus Henderson Investors

- Is growth still possible in the current market environment?
- Do thematics still have a place in a core portfolio?
- How can you exploit private market opportunities in Biotech?

11.40am Panel Discussion

Investment Themes and Strategies for the year ahead

- What investment products and themes are interesting for HNW clients in Indonesia today?
- From an investment perspective - what positive developments have we seen in the business of asset and wealth management?
- What is lacking in the local investment market?
- Is there a growing interest in Private Markets?
- How are different tools being used in portfolios? For example, ETFs?
- How are clients generating income today?
- What developments have there been in clients ability to engage international funds?

Chair

Andrew Hendry
CEO Asia
Janus Henderson Investors

Speaker

Antony Dirga
President Director
Trimegah Asset Management

Novi Imelda
Chief Investment Officer
Prudential Life Assurance

Guntur Putra
President Director, CEO
Pinnacle Investments

12.15pm Presentation
Trends in Wealth Planning and Succession

Irene Lee
Business Development Director
British and Malayan Trustees

- What is wealth planning and succession
- Why is it important to plan
- What will be value add and differentiating factors of an effective plan

- How can wealth planning practitioners ensure success

12.30pm Panel Discussion

Sustainable Wealth Management – finding, training, and retaining the right talent

- Is finding the talent an issue in growing your platform?
- How are client's needs evolving?
- Growing your AUM - client retention, existing client referrals and prospecting.
- How can learning and professional development help you add value and differentiate your offering?
- Why is improving skills so important?
- Trusted adviser – what does that even mean?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Samdarshi Sumit
President Director & CEO
PFI Mega Life Insurance

Kenny Suen
Principal Officer, Chief Marketing Officer
Bill Morrisons Wealth Management

1.00pm Lunch & Networking

2.00pm Forum Ends