

Hubbis Indonesian Wealth Management Forum 2017

8.40am Registration

9.00am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.05am Panel discussion

Building capacity and capability in wealth management in Indonesia

- What's the biggest opportunity for growth in Indonesian wealth management?
- How do we move away from a 'red carpet' mentality to deliver true advisory?
- What's the opportunity for foreign banks? How do they build scale in wealth management?
- What's the potential for digitisation in wealth management in Indonesia?
- Does pressure to generate results always mean that the client in Indonesia will get a bad deal? How can we change the mind-set to put clients' needs first?
- What's the right mix of compensation and commission and incentives to build a sustainable platform?
- In a slower economy and with fewer loans from the banks – how do wealth managers make fee-based income work?
- How do you find quality people? How do we train them?
- With regulation to create a financial planning classification expected in 2018 – when will we see a big uptick in IFAs and financial planners in Indonesia? Do clients really care?
- Has there been a drop in efficiency in terms of sales efforts?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Seema Bhayat
Deputy Head of Private Banking, Asia
Lombard Odier

Yulius Ardi
Head, Managed Investment Products Wealth Management
Standard Chartered Bank

Widrawan Hindrawan
Executive Director, Wealth Management Head
DBS Bank

Sigit Prihatmoko
Head of Strategic Planning Group, Strategic Planning Division
Bank Negara Indonesia

9.55am Keynote Presentation

Evolution of private banking and wealth management resulting from digitisation

Agnieszka Zbroszczyk
Business Solution Manager
Comarch

Grzegorz Prosowicz
Consulting Director
Comarch

- New reality and challenges in private banking and wealth management
- Exploring reasons and aims of digitisation.
- How technology can complement the traditional approach to private banking.
- Recommendations for digital strategies

10.15am

WealthTalk

Building a future-proof wealth management offering

- Trends and opportunities
- Impact on the industry

Evrard Bordier
CEO and Managing Partner
Bordier & Cie

10.40am

Presentation

Emergence of digital retail wealth

Sandeep Lalwani
Executive Director – Europe and APAC
EbixCash Financial Technology (Formerly Miles Software)

- Trends and opportunities
- Impact on the industry

10.50am

Refreshment & Networking

11.20am

Presentation

Investor migration and the rise of the global citizen

Daphne Chandra, IMCM
Country Head, Indonesia
Henley & Partners

- Global trends and developments in investor migration
- What's driving investor migration for Asian HNWIs?
- Key considerations for HNWIs in relation to residence and citizenship planning

11.30am

Presentation

Singapore & Hong Kong as Asian wealth management centres & overview of CRS and AEOI

Irene Lee
Head of Business Development, Singapore
Equiom Group

- Overview – Asia in general
- Singapore and Hong Kong as wealth management centres
- Singapore & Hong Kong companies
- Brief summary on CRS & AEOI
- Other estate planning tools

11.40am

WealthTalk

Wealth TALK Using HNW insurance solutions for liquidity planning and guaranteed returns

Using HNW Insurance solutions - such as high and low life cover Universal Life, HNW clients can:

- Achieve higher returns, with a guaranteed strong minimum returns, better than a bank account rate
- Secure leveraging and liquidity whenever they need within an insurance policy
- Use insurance solutions for retirement and annuity planning, and effectively avoid probate through proper estate planning

Jeroen Simons
Director, High Net Worth Business Development
Sun Life Financial

11.50am

WealthTalk

The importance of selecting the right partner to grow your clients' wealth

Vivian Secakusuma
President Director, Indonesia
BNP Paribas Asset Management

12.00pm

Panel discussion

Growing opportunities for collaboration between onshore and offshore fund managers

- How have recent regulatory changes presented new opportunities for you?
- How will this help clients in Indonesia get access the global markets and be more diversified with their portfolios?
- How can clients get global market access through banks?
- What take-up and growth will we see in discretionary accounts?
- What future developments do we expect to see?
- How is the government becoming more supportive of the development of the capital market, asset management and wealth management?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Ari Adil
Senior Executive Vice President, Head of Product Development & Management Division
PT Mandiri Manajemen Investasi

Imelda Sebayang
Country Head, Securities Services
Citi

Yifei Li
Director, Head of South East Asia Retail Business
BlackRock

Ivan Kusuma
Senior Vice President, Head of Investment Business
Commonwealth Bank

Steven Satya Yudha
Head - Sales & Distribution
Ashmore Investment Management

12.50pm

Lunch

13.30pm

Panel discussion

Wealthy business families – how do we meet their needs?

- How does CRS and information exchange create challenges or opportunities for Indonesian banks and wealth managers?
- Is this driving clients to get advice for the first time? And impacting their decisions to keep assets onshore / offshore?
- What is the current level of knowledge and activity around preserving and protecting wealth?
- How do clients currently think about succession planning? What solutions do they use?
- How can we drive more effective and specific conversations about insurance and other products or structures for inter-generational wealth transfer?
- Who are the right professionals and advisers for families to engage? And how should they choose between them?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Seema Bhayat
Deputy Head of Private Banking, Asia
Lombard Odier

Evrard Bordier
Managing Partner
Bordier & Cie

Irene Lee
Head of Business Development
Equiom Group

Simon Lints
Chief Executive Officer - Singapore
Schroders Wealth Management

14.20pm

WealthTalk

Developing the insurance offering to drive wealth

- What role can the wealth management and insurance industries play in Indonesia to help the economy grow over the long term?
- How will this help Indonesians prosper?

Jonathan Hekster
Chief Executive Officer
Manulife

14.30pm

WealthTalk

The risk of ageing in wealth management

- What's the risk?
- How do we deal with it?

Edy Tuhirman
Chief Executive Officer
Generali

14.45pm

Head - to - Head Q & A

Finding the right technology partner

Shyh Jih Lee
Business Solutions Manager, Asia
ERI Banking

- With an emerging private wealth management (PWM) market like Indonesia, how can a technology solution provider help?
- What should emerging market PWM be doing to take advantage of real innovation/automation, to benefit both its clients and its own profitability?
- What can digitisation mean for emerging market PWM?

15.00pm

Refreshment & Networking

15.30pm

WealthTalk

The question is... do you want to be known for being smart, or for being wise?

- The skills you need for a new age of wealth management

David MacDonald
Head of Learning Solutions
Hubbis

15.45pm

WealthTalk

What does it take to be successful in wealth management today?

- Market challenges
- Industry trends
- What clients want from you
- How to be a successful wealth manager in today's environment

Michael Stanhope
Founder & Chief Executive Officer

Hubbis

16.10pm

Panel discussion

Creating a long-term investment mind-set in Indonesia

- What can be done to facilitate mutual fund distribution in a more meaningful way?
- How do we further expand the product range? What do clients want?
- When will we see a genuine move towards advice?
- What is the long-term opportunity that Indonesia represents in wealth and asset management?
- How can we drive portfolio-led conversations and rebalancing?
- How do we penetrate millennials? What model would work?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Vera Margaret
Vice President, Wealth Management and Private Banking Product Group Head
CIMB Niaga

Rheza Karyanto
Senior Vice President, Head of Bancassurance Product
Commonwealth Bank

Simon Lints
Chief Executive Officer - Singapore
Schroders Wealth Management

17.00pm

Forum End