

Full Agenda - Indonesian Wealth Management Forum 2018

8.40am **Registration**

9.00am **Welcome Address**

Michael Stanhope
Chief Executive Officer
Hubbis

9.05am **Panel discussion**

Is the wealth management offering in Indonesia evolving rapidly enough?

- Where will the continued growth come from and what are your priorities?
- How is regional wealth management developing?
- How are private banks changing their proposition?
- What does the private banker of tomorrow look like?
- Whats the role today of regional financial centres like Singapore?
- How do the different players – wealth management, insurance and banks compete or complement each other?
- How is the insurance market developing – especially for HNW?
- How important is digital today?
- Offshore / onshore. Where is the long-term opportunity?
- Is there a hybrid model where international banks can work with onshore banks?
- What changes are we seeing in client expectations and behaviour?

Chair

[Michael Stanhope](#)
Chief Executive Officer
Hubbis

Panel Members

Ranjit Khanna
Head of South Asia and NRI Asia & Middle East
UBP

Simon Lints
Chief Executive Officer - Singapore
Schroders Wealth Management

Kimmis Pun
Senior Managing Director, Head, Greater China
EFG Bank

Carolyn Leng
Regional Head of Sales, Private Banking
CIMB Private Banking

Steven Suryana
Head of Wealth Management, Retail Banking and Wealth Management
HSBC Bank

Chris Bendl
Chief Executive Officer & Country Manager
Zurich Topas Life

9.55am

Head - to - Head Q & A

Recent Trends and Developments in Investor Migration

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

10.10am

Presentation

Current Wealth Management Trends

Irene Lee

Business Development Director, Intermediary and Partnership
Hawksford

- Overview - Asia in General; GDP and Growth
- Updates on Singapore and Hong Kong as Wealth Management Centres
- Brief Updates on CRS and AEOI
- Tax Compliant Estate Planning Tools

10.20am

Panel discussion

TECH / DIGITAL = Faster, cheaper and better wealth management

- What's the potential for non-banks and other start-ups to eat into existing market share of organisations built on a traditional business model supported by RMs and bricks and mortar wrapped around well-known brands that are perceived to be safe?
- Build it yourself or PLUG & PLAY?
- What digital trends are we seeing elsewhere?
- Platforms and processes – what's the role of digital?
- Which technology solution provider do I choose?
- What are the consequences of not doing enough or anything?
- What is the client experience supposed to look like?
- Have we seen any examples of tangible success in digital wealth management?
- How should banks decide what's working? What KPIs should we use?

Chair

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Chief Executive Officer
Hubbis

Panel Members

Michael Gerber

Chief Executive Officer
360F

Namit Khanna

Sales Director - SEA & India
Finantix

Anthony J. Harper
Chief Executive Officer and Co-Founder
Axial Partners

Loïc Pitrou
Co-founder and CEO
New Wealth

Ivan Kusuma
Senior Vice President, Investment Business Head
Commonwealth Bank

11.00am

Head - to - Head Q & A

Physical Gold – making a shiny and solid contribution to any portfolio

David Fergusson
Chairman
Global Precious Metals

- Why should you buy physical Gold?
- How should you buy it? Or not buy it?
- Where should you store it?

11.10am

Refreshment & Networking

11.35am

Presentation

Key trends in the global ETF market and passive investing

Ogar Renaldi Widjaja CFA FRM
Passive Sales, Head of Intermediaries, Global Coverage Group
DWS

- Global ETF market is over \$4 trillion and bigger than hedge fund industry. Why has it grown so fast? Is passive going to surpass active?
- Who uses ETFs? How do different investors use ETFs?
- What are the recent trends / flows? Which asset class / sectors have seen the most inflows / outflows?

11.45am

Presentation

Re-imagining Wealth Management for the Digital Age

Dhawal Kamath
Country Chief Executive Officer, Philippines, Head of Products SEA
EbixCash Financial Technology (Formerly Miles Software)

- The Winds of change in Wealth management
- The Omni Channel Myth
- The Reimagined technology
- Digital Push

11.55am

Presentation

How technology is changing the way we distribute structured products

Eric Michl

Head of Equity Derivatives Trading, Asia
Commerzbank

Digital trends: what we sell, to whom, how and in which format:

- **what:** payoffs range from simple vanilla options to complex exotic products
- **to whom:** clients range from large Private Banks (B2B) to individual investors (B2C) across Europe, Asia and the US
- **how:** wide variety of digital distribution channels, including exchanges, third-party trading platforms, email, bilateral connections
- **format:** listed, OTC, securitized

Does technology make structured-product trading faster, cheaper and more efficient?

12.05pm

Panel discussion

Helping wealthy families in the new transparent world

- What are the needs of wealthy Indonesian Families?
- How are they dealing with legacy and succession planning?
- How do you have a conversation with clients around sensitive family issues?
- New tax developments?
- What's the role of insurance in this mix?
- What are the practical considerations for HNW clients in wealth protection and transfer?
- How are these needs developing? And how can you help clients understand these needs?
- What trends are we seeing in Philanthropy?
- How do wealthy clients structure their non-investment assets?
- Do clients really understand the problems they have?

Chair

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Panel Members

Chris Burton

Managing Director
VISTRA Group

Jeroen Simons

Director, High Net Worth Business Development
Sun Life Financial

Richard Piliero

Regional Executive
Finaport

Benjamin Szeto

Partner, Private Wealth
RHTLaw Taylor Wessing

Hassan Karim

President Director

Zurich General Insurance

Malcolm K-L Lim

Director
Sovereign Straits Trust

13.00pm

Presentation

The World of Digital: As many promises, as many threats

Nagaraj Prasadh

Country Head
Intellect Design Arena

With the digital wave (of rather, a Tsunami), we have experienced complete disruption in multiple industries.

- What does digital mean to the World of Investments ?
- Is there a threat of dis-intermediation ?
- Or maybe, it's a world of new opportunities?
- A new definition for experience. And may be, a shift from the Macro to the Micro....

13.10pm

Lunch

13.50pm

Room A – Workshop

The World's Leading Residence - and Citizenship-by-Investment Programmes

- Overview of Immigration programmes
- The leading Citizenship-by-Investment Programmes in the Caribbean
- European Citizenship-by-Investment in Malta and Cyprus
- Attractive European Residence-by-Investment Programme

Daphne Chandra, IMCM

Country Head, Indonesia
Henley & Partners

Scott Moore, IMCM

Country Head Philippines
Henley & Partners

13.50pm

Room B – Workshop

Re-imagining Wealth Management for the Digital Age

- The Reimagined technology
- Digital Push

Sachin Gawade

Director Sales | Asia Pacific
EbixCash Financial Technology (Formerly Miles Software)

14.30pm

Room A – Workshop

Managed Accounts in Asia

Managed accounts are one of the largest and fastest growing segments of the wealth

management market globally, eclipsing \$5 trillion of assets in the U.S. market alone. Increasingly they are available in Asia as an important tool for wealth managers to access third party asset managers to implement tailored and transparent solutions for their discretionary portfolio management clients.

- What is a managed account?
- How does it work?
- Making money for clients with managed accounts
- Why is a managed account relevant in Asia today?
- Who is Axial Partners?

Anthony J. Harper

Chief Executive Officer and Co-Founder
Axial Partners

14.30pm

Room B – Workshop

UK private tax client issues

- What are the Challenges arising from the UK Criminal Finances Act 2017?
- What does the new ‘Corporate Offences of Tax Evasion’ legislation mean for you?
- The Statutory Defense of ‘Reasonable Procedures’
- Unexplained Wealth Orders
- Are your structures / planning underpinned by the correct tax advice?
- Investing in UK property residential property: traps, pitfalls and planning tips

Gez Owen

General Counsel and Head of Content
Hubbis

Laurence Lancaster

Barrister-at-law, Group Head of Tax
Sovereign Group

15.10pm

Refreshment & Networking

15.30pm

Panel discussion

Building investment capability and refining the proposition

- Regulation and compliance – what are the challenges?
- Has there been any positive developments in the local investment management industry in the last 12-months?
- What’s your wish list? What would you like to see change?
- What scope would you like to see for local and overseas asset managers to collaborate?
- Will there ever be more chance to be more international in our investment thinking?
- Is there any move towards advice? Discretionary?
- How are you thinking about fund selection and portfolio construction? Open architecture – myth or reality?
- Incentivising the right behaviour to get to sustainable earnings for the organisation and the right outcomes for clients
- The sales process and suitability – to what extent is the business maturing and becoming more structured and professional?

Chair

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Panel Members

Ogar Renaldi Widjaja CFA FRM

Passive Sales, Head of Intermediaries, Global Coverage Group
DWS

Antony Dirga

Chief Executive Officer
Trimegah Asset Management

Bill Johnston

President Director & CEO
Mercer

Glant Saputra Hadi

SVP Head, Segmentation & Wealth Management
BII Maybank

Steven Satya Yudha

Head - Sales & Distribution
Ashmore Investment Management

16.15pm

Panel discussion

Regional wealth management – investment themes and processes

- How would you like to see the opportunity in Indonesia develop for you?
- What products do you feel would be most valuable to clients in Indonesia?
- How are regional wealth management firms improving their investment processes and platform?
- Global equity markets have seen a strong run. Does it still have legs? Or are we reaching a terminal stage? Where do you now turn to drive long-term returns for a portfolio?
- What alternative investments are there for HNW and UHNW clients and why are they relevant?
- What's the increasing role of Physical Gold?
- How do clients in Asia think about risk today?
- What have been some of the popular investment products sold this year?
- Opportunities of key market mega-trends of millennial, baby boomers, women empowerment, ESG, SRI. How are you capitalising on these?

Chair

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Chief Executive Officer
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Panel Members

Olivier Robine

Managing Director, Head of Equity and Commodity-Asia
Commerzbank

Shihan Abeyguna

Head of Business Development, South East Asia
Morningstar

Joshua Rotbart

Managing Partner
J. Rotbart & Co.

David Fergusson

Chairman
Global Precious Metals

17.00pm

Keynote Presentation

Being Human

David MacDonald

Head of Learning Solutions
Hubbis

- Trust me - I'm not a robot
- Relationships rule
- Why you?

17.10pm

Forum End

Workshops