

Indonesian Wealth Management Forum 2018

8.40am Registration

9.00am Welcome Address

Michael Stanhope
Founder & 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?
- What's 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
Founder & Chief Executive Officer
Hubbis

Speaker

Ranjit Khanna
Singapore Branch Chief Executive, Market Head, South Asia, Private Banking
UBP

Simon Lints
Chief Executive Officer, Singapore
Schroders Wealth Management

Kimmis Pun
Managing Director, Head of Private Banking, Singapore
VP 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

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

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Michael Gerber
Chief Executive Officer
360F

Namit Khanna
Sales Director - SEA & India

InvestCloud

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

Loic Pitrou
Co-founder and CEO
New Wealth

Ivan Kusuma
Head of Investment and Liabilities
Bank Commonwealth

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
Passive Sales, Head of South East Asia and Intermediaries
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

- 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

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Chris Burton
Managing Director
Vistra Private Wealth

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

Richard Piliero

Benjamin Szeto
Partner, Private Wealth
RHTLaw Taylor Wessing

Hassan Karim
Head of Strategy APAC

Zurich Insurance

Malcolm K-L Lim
Director
Sovereign Straits Trust

1.00pm

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

Nagaraj Prasadh
Director & 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....

1.10pm

Lunch & Networking

1.50pm

Room B – Workshop

Re-imagining Wealth Management for the Digital Age

- The Reimagined technology
- Digital Push

Sachin Gawade
Head Of Global Sales
EbixCash Financial Technology

1.50pm

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
Managing Director
Henley & Partners

2.30pm

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

2.30pm

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
The Sovereign Group

3.10pm

Refreshment & Networking

3.30pm

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

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Ogar Renaldi Widjaja
Passive Sales, Head of South East Asia and Intermediaries
DWS

Antony Dirga
President Director
Trimegah Asset Management

Bill Johnston
Chief Commercial Officer
Private Client Services by Mercer

Glant Saputra Hadi
SVP Head, Segmentation & Wealth Management
Maybank

Steven Satya Yudha
Head - Sales & Distribution
Ashmore Investment Management

4.15pm

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

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Olivier Robine
Managing Director, Head of Equity and Commodity-Asia
Commerzbank

Shihan Abeyguna
Head of Business Development, Asia
Morningstar

Joshua Rotbart
Managing Partner
J. Rotbart & Co.

David Fergusson
Chairman

Global Precious Metals

5.00pm

Keynote Presentation

Being Human

David MacDonald
Head of Learning Solutions
Hubbis

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

5.10pm

Forum Ends