MALAYSIA WEALTH MANAGEMENT FORUM 2022

8.30am	Registration
8.55am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
9.00am	Panel Discussion Wealth Leaders – positioning for and embracing growth in the post-pandemic world • What is your vision for wealth management in the Malaysia in a (hopefully) 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? • More generally, How will the competitive arena evolve in the coming years? Are the leaders ready for those challenges? • How are you evolving the quality and type of advice you offer to clients? Chair Michael Stanhope Founder & Chief Executive Officer Hubbis Speaker Reuben Tan Head of Wealth Management OCBC Bank Alvin Lee Country CEO Maybank Singapore Maybank Vernice Moh Managing Director, ASEAN LSEG Osama Khan Product Manager – Wealth Management Standard Chartered Bank
9.45am	Presentation Digitalization in Wealth Management Ryan Page Head of Sales (ASEAN / Pacific / South Asia), Wealth LSEG

- What is it?
- Why is it important?
- Where do I start?

10.05am Panel Discussion - Sponsored by Refinitiv, an LSEG Business

Driving Digital Transformation

- How do you use technology within your platform?
- What does digitalization mean to you and your firm?
- How are 'digital challengers' getting on? And what's the opportunity?
- Where are you up to in this journey?
- Is there a new wealth model that aligns both the human and digital in a seamless collaboration for the delivery of optimised investment products, ideas and advice for private wealth clients?
- What is coming next in the world of digital technologies and services that will further enhance the wealth management offering, and how can those improve the proposition?
- How do the private banks and retail banks make the right decisions, firstly on what areas to focus on, and then which solutions to adopt and which technology partners to work with?
- Are these digital tools really elevating the skills, capabilities and productivity of the client-facing RMs and advisors?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Wai Ken Wong
Country Manager, Malaysia
StashAway

Alvin Tan
Chief Executive Officer
UOB Kay Hian Wealth Advisors

Gurpreet Khera
Chief Business Officer
Boost Credit

Bobby Bok
Sales Strategy & Execution Director, Wealth Solutions - Asia Pacific
LSEG

Encik Khairi Shahrin
Head of Digitalisation
Malaysian Industrial Development Finance (MIDF)

10.45am Presentation
Citizenship and Residency – Opportunities and Trends for the year ahead

Nirbhay Handa
Group Head of Business Development
Henley & Partners

- Alternative residences or citizenships in times of Political Uncertainty

- Domicile diversification – a new asset class
- Real estate investment rankings for migration

11.00am

Head - to - Head Q & A

Why is the Investment Migration industry booming?

Nirbhay Handa
Group Head of Business Development
Henley & Partners

- Where do your clients come from?
- Why do private wealth managers and advisors work with you?
- How can H&P help HNWI clients?
- What are the pitfalls that HNWIs should be aware concerning investment migration?
- What's changed post covid?

11.15am

Refreshment & Networking

11.45am

Panel Discussion - Sponsored by Jersey Finance

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

- Developments in Wealth Planning and Structuring, and Family Succession
- Challenges facing UHNW families
- NextGen expectations
- How are global attitudes towards Islamic Wealth Management changing?
- The increasing importance of sustainability, climate and ESG
- Transferring wealth successfully to the next generation
- How are founders, patriarchs, matriarchs and their families dealing with the estate and family business succession?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Farah Deba Mohamed Sofian
Partner
Messrs Wong Lu Peen & Tunku Alina

Nor Fazlina Binti Mohd Ghouse
Chief Executive Officer
Maybank Trustees

Daud Vicary Abdullah
Managing Director
DVA Consulting

12.30pm

Panel Discussion - Sponsored by Janus Henderson Investors

Investment Themes and Strategies for the year ahead

- What investment products and themes are interesting for HNW clients in Malaysia

today?
- From an investment perspective - what positive developments have we seen in the business of asset and wealth management in Malaysia?
- What is lacking in the local investment market? Like the ability to go short.
- How is the new tax regime affecting investors and changing priorities?
- Is there a growing interest in Private Markets?
- How are different tools being used in portfolios? For example, ETFs and Structured Products?
- How are clients generating income today?

Chair

Andrew Hendry
CEO Asia
Janus Henderson Investors

Speaker

Shan Saeed
Global Chief Economist
IQI Global

Chi-cheun Teh
Managing Director
BOS Wealth Management Malaysia

1.00pm	Lunch & Networking
2.00pm	Forum Ends