MALAYSIA WEALTH MANAGEMENT FORUM 2024

8.30am	Registration
8.45am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
8.50am	Panel Discussion Trends, Opportunities and Challenges for the Industry • What is the Evolution of the Private Wealth Management Landscape? • What are the Challenges and Opportunities? • What are the emerging trends and future expectations of clients? • International Firms - competition or collaboration? • Which business model is best? • What are the effective methods for identifying and attracting top talent in the wealth management industry? How are you Finding, Training, Retaining, Empowering and Motivating your top performers? • Your key priorities for the year ahead? Chair CheeMee Ho Director, Head of Malaysia Henley & Partners Speaker Reuben van Dijk Director Melbourne Capital Group Reuben Tan Head of Wealth Management OCBC Bank Rajesh Gupta Regional Affluent Head CIMB Bank
9.20am	Presentation Wealth Migration, BRICS Influence, and University Degrees with a Passport Rory McDaid Managing Director Private Clients Henley & Partners • 2023 score of countries with the largest inflows and outflows of millionaires • BRICS Wealth Report • How to graduate with a degree and a passport

9.35am Panel Discussion

Evolving the Platform and Proposition: Improving the Client Experience

- Private wealth managers constantly face challenges related to regulation, competition, and changing customer expectations, but they also have significant opportunities to leverage technology for digital transformation, better customer experiences, and increased efficiency.
- What is the future of wealth management in the digital age?
- What is the role of technology and digital tools in modern wealth management for HNW clients?
- Success Stories and Case Studies - Digital Transformation Strategies.
- What are the best Client-Centric Approaches?
- Artificial Intelligence or Emotional Intelligence – which is more important?
- What's the priority? How are you allocating your resources? Enhanced Customer Experience, Data Analytics, Automation, and FinTech Partnerships.

Chair

Darell Miller
Managing Director APAC
Wealth Dynamix

Speaker

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

Tomoko Nasuho
Sales Director, Southeast Asia
Avaloq

Anurag Pandey
Head of APAC Market
additiv

Jamie Bubb-Sacklyn
Chartered Financial Planner
Melbourne Capital Group

10.05am Presentation
Millennials : Reshaping the future of Wealth Management in Asia

Endang Werang
Business Development Manager
Comarch

- Fun fact about Millennials
- New way of getting the message heard
- Attract, onboard, engage, retain – getting things done in the right way

10.20am Head - to - Head Q & A

Grzegorz Prosowicz, Ph. D
Head of Consulting and Product Management
Comarch Capital Markets

- How are wealth managers in Malaysia enhancing their digital capabilities?

- What are some of the trends we are likely to see in 2024?
- How does Comarch help with the process of digital transformation?

10.30am	Presentation Strategies to pursue the wealth opportunity in Malaysia

Vibhooti Chaturvedi
Regional Director, Head of South Asia
Avaloq

- Explore how wealth management firms in Malaysia need to prioritize client-centric approaches by aligning their services with evolving client priorities and emphasizing personalized financial strategies.
- Discuss the role of cutting-edge technologies, such analytics and digital platforms, enabling firms to enhance client experiences, streamline operations, and provide more accessible services.
- Explore the evolving economic landscape in Malaysia and the need for wealth management firms to adjust to new economic models, take advantage of opportunities in growing areas, and handle regulatory changes to succeed in the Malaysian wealth management industry.

10.45am	Presentation Reimagining the Financial Services Value Chain through Embedded Finance

Anurag Pandey
Head of APAC Market
additiv

- How embedded finance is reshaping the financial services landscape.
- Consumer preferences for cost-effective, tailored and engaging financial solutions.
- How platform economics make serving the mass-market viable.
- Success stories and strategic imperatives for financial and non-financial institutions.

11.00am	Refreshment & Networking
11.30am	Presentation Scaling Without Pain – Can You Have Your Cake and Eat It Too?

Darell Miller
Managing Director APAC
Wealth Dynamix

- Why breaking the chain between revenue and costs is crucial for Wealth Managers and Private Banks that want to scale profitability.
- Why does this matter now?
- How do you break the chain and enable relationship managers to better serve their clients?
- Scale, eat, repeat!

11.45am	Panel Discussion

Wealth Planning and Structuring – Understanding the Needs of Our Clients

- What is the future of Labuan? Onshore or Offshore solutions? What will be key to its future success?
- Should Malaysia reform its trust law (Trustee Act 1949)? What should be changed and why?
- Are Malaysian business families adequately prepared for generational change? What will be key: family charter, shareholder agreement, business trust?
- When is the right time for a business family to consider a Family Office?
- Will Malaysia reintroduce Inheritance Taxation? What has been the impact of the new CGT legislation? Will Malaysia introduce CFC rules? What are the implications of managing and controlling a foreign company in Malaysia?
- Which financial centre is more suitable to Malaysian HNW families and individuals: Singapore, Hong Kong, UAE, Channel Islands (Jersey) or Caribbean (BVI)?

Chair

Zac Lucas
Partner – International Private Wealth
Spencer West LLP

Speaker

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

Woon Hum Tan
Partner, Head of Trust, Asset & Wealth Management Practice
Shook Lin & Bok

Nor Fazlina Binti Mohd Ghouse
Chief Executive Officer
Maybank Trustees

Lai Kok Tai
Partner – Head of Corporate Tax, Family Business Tax Leader, KPMG Private Enterprise Malaysia
KPMG

12.15pm Presentation
Enabling the Future of Wealth Management

David Knights
Head of Asia Distribution
Investors Trust

- Deploying digital and technology developments as an enabler for wealth managers and to elevate the client experience.
- The role product providers can play in assisting talent development.
- Estate and succession planning – the role that offshore life products can play.

12.30pm Presentation
Redefining Wealth Managers' access to US Treasuries in the form of an ETF Vehicle.

Alessandro Zhu

Portfolio Manager, Deputy Head of Fixed Income
CSOP Asset Management

- How can a US Treasury ETF provide Wealth Managers a nimbler approach to gain exposure to US Treasuries?
- What end investors stand to benefit from investing in a US Treasury ETF versus the standard US Treasuries?
- How can the ETF Manager create better portfolio management experience for Wealth Managers and its clients?

12.45pm	Panel Discussion

Curating a Relevant and Professional Investment & Advisory Proposition for Private Clients

- What are the local market and also international investment scenarios, the outlook ahead, and where they see the key opportunities?
- What are the major regulatory impediments facing HNW investors in terms of developing a fully global investment allocation?
- In terms of allocations to mainstream public market assets (equities and fixed income), are HNW clients more focused on active or passive strategies?
- What sort of demand amongst HNWIs for private and alternative assets, and what is the outlook?
- Is ESG a key driver for investment choices amongst wealthy private clients? Why, or why not?
- Is there strong local demand amongst HNW clients for fee-based advisory, or discretionary portfolio management, or do clients there tend to want to retain control of their investment decisions? What are the trends?
- Generally, how is the wealth management industry evolving and adapting to deliver the best investment and advisory offerings to HNW clients?

Chair

Alex Ng
Head of Intermediary Sales, Asia
Janus Henderson Investors

Speaker

Eng Ping Lim
Head, Private Wealth Malaysia
Maybank

K R Raju
Partner
MCG Group

Alessandro Zhu
Portfolio Manager, Deputy Head of Fixed Income
CSOP Asset Management

1.15pm	Lunch & Networking
2.00pm	Forum Ends