# Malaysian Wealth Management Forum 2016

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| 8.40am | Registration |
| 9.00am | Welcome Address<br><br>Michael Stanhope<br>Founder & Chief Executive Officer<br>Hubbis |

9.10am

Panel Discussion

Is wealth management in Malaysia progressing too slowly? Will the opportunity pass us by?

- Where are we at in the development of wealth management in Malaysia?
- In a tough year like 2016 - what can we do to kick-start the revenue engine and turn more of the savings into investments?
- How can local banks increase their penetration of wealth products? What can they learn from foreign banks?
- Is there real competition yet from IFAs, insurance companies and other wealth management providers?
- A lot of assets still flow to Singapore - why has private banking not developed quicker in Malaysia? What's lacking?
- Does anyone have a clear digital strategy? Does digital represent a real opportunity within Malaysian wealth management?
- What measures would help the development of the market?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Alvin Lee
Country CEO Maybank Singapore
Maybank

Danny Chang
Executive Direcor, Head of Managed Investments and Investment Advisory, Wealth Management
Standard Chartered Bank

Robert Foo
Managing Director, Founder
MyFP Services

Chze How Ng
Director, Retail and Retirement Funds
AIA

Carolyn Leng
Head of Private Banking

CIMB Private Banking

9.55am

Presentation

Residence and citizenship planning for Asian families - an overview

Dominic Volek
Group Head of Private Clients and Member of the Executive Committee
Henley & Partners

- Why do families relocate?
- What should HNW families consider when carrying out residence and citizenship planning?
- Current developments in residence and citizenship programmes

10.05am

Presentation

Asian business families: how to prevent falling prey to common succession planning problems?

Hans Diederen
Head - Family Office Services
Heritage Asset Management

- The family business as a system
- Why family businesses fail to do succession planning?
- Values, vision and shared purpose
- The importance of both family and business governance
- The benefits of timely preparation

10.15am

Panel Discussion

When will we stop being obsessed with short-term revenue - and start focusing on generating long-term value?

- How can we become providers of solutions not products?
- What can we do to drive proper needs-based conversations with customers?
- Whose responsibility is it to do client education?
- Isn't it time to promote and enforce higher competency standards in Malaysia?
- Will the second generation of advisers be better qualified and approach the business differently?
- What are the needs and objectives of your clients? How do you evaluate these, put together a proper plan and promote a portfolio approach?
- What fee model works best - and is realistic?
- Do we need to improve the ethics, experience, education and examination requirements for people to sell unit trusts in Malaysia? Do we need to reduce this number of people?
- If people can't make decent money out of this business - why would anybody want to join it?

Chair

Michael Stanhope
Founder & Chief Executive Officer

Hubbis

Speaker

Nazaruddin Othman
Chief Executive Officer
Federation of Investment Managers

Alvin Tan
Chief Executive Officer
StandardFA

Kin Onn Kee
Head
WIN Group

Yap Ming Hui
Founder & Managing Director
Whitman Independent Advisors

11.00am Refreshment & Networking

11.30am Presentation
What IF an Uber Wealth was born?

Raj Ganesarajah
Country Head, Senior Vice President, Malaysia
Intellect Design Arena

- The promise of digital in context of wealth management
- Digital wealth – elements for innovation and transformation
- From wealth management to returns management
- From relationship management to assisted advisory
- The ultimate digital took-kit

11.40am Presentation
Today's small-caps are tomorrow's blue chips

Alistair J. Macdonald
Vice President & Institutional Portfolio Manager for the Templeton Emerging Markets Group
Franklin Templeton

Isn't EM small cap a niche, illiquid asset class? No, but it is an under-researched and under-owned asset class.
Small caps offer growth in a low growth world.
Isn't investing in EM small caps too risky?
If not, what is the key to success?

11.50am Presentation
Challenges in advising business families

Shanker Iyer

Independent Financial Advisor

Common challenges faced by business families
The demands placed on advisers to meet these

12.00pm Panel Discussion

Driving Malaysia's Islamic wealth management industry forward

- What is the role of Malaysia today as Islamic wealth management gains more traction?
- How do you activate Islamic banks in selling more wealth management products?
- To what extent are Islamic products an important part of client portfolios? Why?
- Where can innovation come from to drive further growth?
- What is the role of Takaful / Trusts in Islamic wealth management?
- How should Islamic products best be marketed and distributed within a wealth management platform?
- Are any changes needed to move Malaysia to the forefront in attracting Islamic clients from around the world?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Sharizad Juma'at
Chief Executive Officer, RHB Islamic International Asset Management, and Group Head of Islamic Business
RHB Islamic Asset Management

Datin Maznah Mahbob
Chief Executive Officer, Executive Vice President
AmInvestment Bank

Raj Ganesarajah
Country Head, Senior Vice President, Malaysia
Intellect Design Arena

Mohar Yusof
Head of Family Office and Islamic Financial Planning
Blueprint Planning

Mahdzir Othman
Chief Executive Officer
i-VCAP Management

12.40pm Lunch & Networking

1.30pm Panel Discussion

What's the role for insurance companies in Malaysian wealth management?

- Where are the biggest opportunities and challenges for insurance companies in the Malaysian wealth management space?
- Who are the players and what's the value they bring?
- What are the options for clients in different segments?
- What's the role of the regulator?
- What's the opportunity for the further development in Takaful insurance?
- Balanced scorecards and deferred commission - what else is happening?
- What role will bancassurance play going forward?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Philip Smith
Chief Executive Officer, Malaysia
Zurich Insurance

Raymond Lew
Chief Distribution Officer
Sun Life Financial

K R Raju
Partner
MCG Group

2.15pm

Presentation
Physical gold: are you ready?

Seamus Donoghue
Vice President of Business Development
Allocated Bullion Solutions

- Are you providing clients the right product?
- Why physical gold?
- Key drivers of gold demand
- Outlook for gold prices

2.25pm

Presentation
SMAs: can HNW investors find them in Asia today?

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

- What is an SMA and how are they used in Australia, the US and Japan?
- How does an SMA fit into discretionary services?
- Who is offering SMAs in Asia and why?
- Fully disclosed versus pooled – key differences
- Rebalancing and automation – fintech requirements
- Where do SMAs using third party models fit on the wealth management shelf? Will they be disrupted by robo-advisers?

2.35pm

Presentation

Revolution or evolution?

David MacDonald
Head of Learning Solutions
Hubbis

- The trouble with compliance…
- From low tech, to fintech
- Survival of the fittest

2.45pm Refreshment & Networking

3.15pm Panel Discussion

Product manufacturers and fund gatekeepers - a slow, slow dance, and a small shuffle towards advice

- How can asset management firms move the business forward - and make the most of the opportunity in Malaysia and across ASEAN?
- What can firms do to restart bank volumes for funds sales? Along with other products
- Where are the alternative investment options?
- Is there a growing interest in ETFs?
- How can we make the end-customer engagement with investment solutions more 'sticky' and focused on meeting their retirement needs?
- Do incentive structures need to change? How?
- Do fund managers need to change the way they engage, support and communicate with fund gatekeepers in Malaysia?
- Passporting - what would make it more effective? And does anybody care?
- Is there any role for digital platforms? Can these impact which products are offered and how they get sold?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Ai Mei Chan
Chief Marketing & Distribution Officer
Affin Hwang Asset Management

Anthony J. Harper
Head of Business Development Managed Account Partners

Steven Seow
Executive Director
Singapore Consultancy

Alex Tan
Head, Retail & Retirement Funds
AmInvestment Bank

4.00pm Panel Discussion

Everyone is worried - what should I do with my money?

- How can you make money in these turbulent times? And with negative interest rates?
- What's the impact of monetary and fiscal policy on global financial markets today?
- The terms 'confidence' and 'fear' are so important. What should be the new benchmarks for investing?
- How can clients really build a high-quality, diversified portfolio?
- What are the biggest risks for 2H 2016?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Seamus Donoghue
Vice President of Business Development
Allocated Bullion Solutions

Shan Saeed
Chief Economist
IQI Global

Munirah Khairuddin
Chief Executive Officer
CIMB-Principal Asset Management

4.45pm Forum Ends