Malaysian Wealth Management Forum 2019

8.30am	Registration
8.55am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis

9.00am

Panel Discussion

Private wealth management - a time of dramatic change

- What are the main opportunities that will continue to drive growth in wealth management in Malaysia?
- What are the challenges that will prevent growth in wealth management in Malaysia?
- Any regulatory hindrances and roadblocks?
- What trends are we seeing in global and regional wealth management?
- How can you get the right people and proposition in front of the right clients?
- Do you have a structured sales process? To what extent does this need to be improved / changed?
- What can you do to improve the value proposition in wealth management?
- What changes are we seeing in client expectations and behaviour?
- Transparency, Margins, Costs and Fees – what's changing?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

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

Robert Foo
Managing Director, Founder
MyFP Services

Sammeer Sharma
Managing Director, Head - Consumer, Private, and Business Banking, Malaysia
Standard Chartered Bank

Ming Hui Yap
Founder & Managing Director
Whitman Independent Advisors

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

Lin Wein Khoo
Head of Private and Priority Banking
Techcombank

9.50am

Presentation
The digital watch or the hand-made Swiss?

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

- How is private banking developing?
- How do you add value and differentiate yourself?
- What are the different business models you can consider?

10.00am

Head - to - Head Q & A

Investment Migration: Trends and Developments for HNWIs

Dominic Volek
Group Head of Private Clients
Henley & Partners

- Why is the Investment Migration industry booming?
- Why does Henley & Partners attend the Hubbis events?
- Where do our clients come from?
- Why do PBs/IAMs etc work with us?
- How can Henley & Partners help your HNWI clients?
- What are the pitfalls that HNWIs should be aware concerning investment migration?

10.10am

Presentation
Consistent, holistic and valuable advice – hope or reality?

Michael Gerber
Chief Executive Officer
360F

- Today, clients and advisors are experimenting to find the right investment and protection products
- The life of client is unpredictable and hence, followed by a disappointing relationship – sometime for both parties
- For clients who understand all potential risks and unforeseen events can step into financial happiness

10.20am

Panel Discussion

Technology - the future of private wealth and asset management?

- Are banks going in the right direction in their digital journey?
- What digital expectations do clients have?
- Has the investment in 'digital' justified the cost? What has worked elsewhere?
- How can we improve efficiency?
- What does the word 'platform' mean to you?
- What's the role of AI?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

John Robson
Chief Commercial Officer
Quantifeed

Andreas Wenger
General Manager, APAC
IMTF

Kelvin Lim
Head of Business Development, Asia
IRESS

Michael Gerber
Chief Executive Officer
360F

Julian Kwan
Co-Founder and CEO
InvestaX

Allen Chote
Head of Strategic Partnerships – South East Asia
FNZ

11.00am

Presentation
Scaling wealth management with digital automation

John Robson
Chief Commercial Officer
Quantifeed

- Scaling to thousands of customers with rising wealth is exciting and challenging
- The threat of failing to do so is immense
- The answer is automation and a local market perspective

11.10am

Refreshment & Networking

11.35am

Presentation
IMTF's Modular RegTech Platform – Building blocks to achieve regulatory compliance

Andreas Wenger
General Manager, APAC
IMTF

- Forward-looking technologies to tackle business challenges (Client Onboarding, Name Screening, AML / Fraud)
- Building on a strong case management foundation to achieve cohesive business operations benefits
- Enabling and ensuring end-to-end leading client and user experience

11.45am

Presentation
Market dislocations: Challenge or opportunity?

Rossen Djounov
Global Head of Distribution and Client Solutions
GAM Investments

- Should slower growth, weaker earnings and elevated stock and bond valuations be considered a challenge or an opportunity?
- The classic 'balanced' portfolio is no longer fit for purpose; diversification could be enhanced by including non-directional, alpha-generating and relative value strategies
- Opportunities within the credit universe, emerging market debt and commodity trade finance can offer new sources of return that are less correlated with traditional assets

11.55am

Presentation
How to use Structured Investment Solutions in a changing market

David Meier
Director, Sales - Structured Solutions
Leonteq

- A suitable solution for each market conditions
- Benefit from market volatility
- A great diversification tool

12.05pm

Presentation
RM Office - 2020 Advantage

Anand Rai
Presales Lead
Intellect Design Arena

- Possibility to Increase RMs productivity by 20%
- Possibility to reduce operational cost by 20%
- Let your system take care of compliance - 3D Compliance
- Leveraging Digital - Enhanced Outreach and contextualized experience
- Actionable insights to direct the destiny of the business

12.15pm

Head - to - Head Q & A

The HNW Insurance Market has Changed – Here's how you win

David Varley
Chief Partnership Officer - Brokerage, International HuBS
Sun Life

- What's happening in the HNW Market?
- How HNW Brokers, Bankers, EAM can adapt to win in the new HNW Insurance Market
- What are the new Products and Trends in HNW Market
- Why should Bankers and Financial Advisers be interested in HNW Insurance

12.25pm	Presentation International Finance Centres: past, present and future

Richard Nunn
Regional Head, East
Jersey Finance

- How IFCs have evolved and what the future now holds
- Beneficial ownership: what just happened?
- The impact and opportunity for Islamic Finance

12.35pm Panel Discussion

What are the growing opportunities for Islamic wealth management in Malaysia?

- How is Islamic asset and wealth management developing?
- Opportunities and Challenges?
- How is Malaysia competing as the preeminent Sharia-compliant Finance Centre? In comparison to KSA, UAE or Bahrain?
- Malaysia has spearheaded a number of innovative developments in Islamic finance – including FinTech. How would you like to see the market develop from here?
- What are the specific wealth structuring requirements within Islamic Finance?
- What are the top concerns for wealthy family businesses when considering Sharia compliant investments abroad?
- What are the core criteria you believe are essential for an offshore financial centre to become a leading Islamic Wealth Management Hub?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Suhazi Reza Selamat
Chief Executive Officer
UOB Islamic Asset Management

Richard Nunn
Regional Head, East
Jersey Finance

Elias Moubarak
Partner
Trowers & Hamlins

1.10pm Lunch & Networking

1.50pm Workshop

Global Citizens: Trends and Developments in Investment Migration

Dominic Volek
Group Head of Private Clients
Henley & Partners

- Introduction to the Investment Migration Industry

- Citizenship-by-Investment: Travel and Settlement Freedom for HNWIs
- The world's leading Residence-by-Investment Programs

2.30pm Workshop

Insights from recent deployments of digital wealth automation to FIs in Asia

John Robson
Chief Commercial Officer
Quantifeed

- Leading financial institutions across Asia are racing to deploy digital wealth management capabilities
- Quantifeed has deployed digital wealth platforms enabling STP of unlisted fund portfolios leveraging our quantitative and financial software engineering expertise
- A sharing session to present the learnings and the technical solutions developed for digital wealth leaders across Asia

3.10pm Refreshment & Networking

3.30pm Panel Discussion

Investing in more uncertain and challenging markets

- Challenges and Opportunities for 2H 2019?
- How is distribution of funds changing? How is digital affecting this?
- Too many investment products and not enough investment solutions?
- Managing and understanding risk — how do you estimate risk, and how does it impact your investment process?
- How do you think Asian equity market performance will be in 2019?
- What Macro trends will create opportunities and challenges?
- Is Malaysia warming to index and ETF products?
- What's the interest of private clients today in; ESG, Alternatives, Private equity, Infrastructure and Property
- Are there any thematic / more secular equity ideas that are poised to do well? Like the environment and climate change?
- What's the outlook for China in 2019? Good time to invest? What sectors are best?
- How do you think Asian equity market performance will be in 2019?
- What's your view on global equity markets?
- What are some of the interesting opportunities in Structured Products today?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Shan Saeed
Global Chief Economist
IQI Global

Ranjiv Raman
Head of Private Assets and Equities, Asia
Schroders Wealth Management

Tony Wong
Head of Intermediary Sales
CSOP Asset Management

Joanne Siu
ETF Sales Director
Samsung Asset Management

Rossen Djounov
Global Head of Distribution and Client Solutions
GAM Investments

David Meier
Director, Sales - Structured Solutions
Leonteq

4.30pm	Forum Ends