

Middle East Wealth Management Forum 2019

8.30am Registration

8.50am Welcome Address

Chair Opening Remarks: Why we are here!

Malik S. Sarwar
CEO
K2 Leaders

9.00am Keynote Address

Time to evolve with agile and innovative ways of working

Peter Huber
Chief Executive Officer
Zurich International Life

- Economic environment remains challenging and previous year insurance industry trends have further accelerated
- Regulations continue intensifying significantly across various locations
- Brokers forms part of the insurance value chain by adding new services
- Customer innovation advances in the new digital world of insurance
- Becoming a customer-led company is crucial for future success for Zurich and insurance companies in general

9.10am Panel Discussion

Driving the wealth management proposition forward

- Enhancing the Wealth Management proposition 2.0. What is the new and improved proposition of WM 2.0 applied in 2018? Plans for 2019.
- How do you deal with the resistance to change within your organisation? How can you drive the right culture?
- How do you deploy your omni-channel to deliver exceptional client experience?
- UAE seems overbanked. What is your niche for meaningful opportunities?
- What are the developing regional opportunities you can service from Dubai?
- How do most firms deploy talent management for hiring, upskilling and retaining?
- Is hiring top performers sustainable? Focus on hiring/grooming young talent?
- We are seeing a focus on trusted advisor skill-building. Which specialist firms are you using for getting better RM qualifications?

Chair

Malik S. Sarwar
CEO
K2 Leaders

Speaker

Sean Kelleher
Chief Executive Officer

Mondial

Ashok Sardana
Founder and Managing Director
Continental Financial Services

Cedric Lizin
Managing Director, Head Wealth Management, Dubai Branch
UBS

Bart Kendall
Director of Wealth Management
Globaleye

Sai Narain
Regional Head of Sales & Distribution, Head of International Markets
HSBC Bank

9.50am

Presentation
Fintech & the bottom line

Fahad Versey
Head of Distribution
Union Insurance

- Global spend on Fintech shows no sign of slowing down
- It represents a disruptive threat to traditional insurance and banking models
- Front end Fintech is game-changing, but it is dependent on a back-office that can back up the high expectations it sets

10.00am

Presentation
Time is money in financial services

Philip Story
Senior Executive Officer and Head of Distribution EMEA
Investors Trust

- Advisers can gain time by using modern systems and solutions
- With more time they can provide an enhanced customer service
- With better customer service they will earn more, short and long term

10.10am

Presentation
Wealth Management 2.1

F. Edward Lopez
Chief Revenue Officer
JHC Financial

- Mandating digital as part of your firm's DNA
- The digital revolution - its more than just front-office engagement
- Introducing firm-wide oversight at your fingertips - new tools for the C-suite

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

Damian Hitchen
Chief Executive Officer, Singapore
Swissquote

Yunus Selant
Regional Manager Middle East & Africa
Allfunds

Philip Story
Senior Executive Officer and Head of Distribution EMEA
Investors Trust

F. Edward Lopez
Chief Revenue Officer
JHC Financial

11.05am

Refreshment & Networking

11.30am

Presentation
Citrine Estates - Invest in Luxury, Live in Nature

Ilya Kustov
Senior Manager
Casamont Cyprus

- General overview of the real estate market in Cyprus
- The Cyprus CIP and the real estate exit strategy
- Citrine Estates

11.40am

Presentation
Regulatory Update

Christian Cameron

Associate Director, Supervision
Dubai Financial Services Authority

- Growth in the Funds & Asset Management Industry
- Proposals – Funds Passporting in the UAE
- Other regulatory initiatives in Funds and Asset Management

11.50am

Presentation
The emerging GCC regulatory landscape

Muneer Khan
Partner, Financial Markets
Simmons & Simmons

- Is there a framework?
- Is cross-border business possible?
- Is using a single hub viable?
- What is the regulatory direction of travel?

12.00pm

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

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

- 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

12.10pm

Presentation
Wealth Protection and Succession Solutions - Family Trusts and Alternative Structures for the MENA Region

Laurence Black
Regional Director, Client Solutions, EMEA
Asiaciti Trust Group

- Regional structuring trends
- Considerations for wealthy individuals, families and businesses

12.20pm

Panel Discussion

What are the challenges that wealthy families face today?

- How do wealthy families try and engage the next generation around handling the wealth?
- Is privacy an interesting topic for this region today?
- What are the tax developments that affect wealthy clients in GCC today?
- How are the local tax frameworks developing?

- Does this force clients to think about reporting and consequences?
- What's the role of regional and international financial centres today?
- What's possible today that was not possible before? For example, new foundations law.
- How are reporting obligations - both globally and locally - developing and to what extent are they relevant to clients in GCC?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Laurence Black
Regional Director, Client Solutions, EMEA
Asiaciti Trust Group

Yann Mrazek
Managing Partner
M/HQ

Nirav Dinesh Kumar Shah
Founder and Managing Director
FAME Advisory DMCC

Tim Denton
Vice President - Head of Trust & Wealth Structuring
Emirates NBD

Kimberley Wilks
Senior Manager - Entrepreneurial Private Business & Family Office
PwC

1.10pm

Lunch & Networking

1.50pm

Workshop

How is technology impacting the delivery of Wealth Management?

Damian Hitchen
Chief Executive Officer, Singapore
Swissquote

An in-depth look at:

- What are the main evolutions being driven by technology?
- What are the client demands re; technology? What are the expectations?
- Is the industry, and its main players, adopting and adapting its delivery of services?

2.30pm

Workshop

Enhancing your impact to delight clients!

Malik S. Sarwar
CEO
K2 Leaders

- Five habits of effective advisers

- Becoming a differentiated adviser; Continuous self enhancement
- How can sales managers upskill themselves?
- How do you engage clients in challenging markets?
- Where is the return now? Simple solutions to discuss with clients today

3.10pm

Refreshment & Networking

3.30pm

Panel Discussion

Developing the product and advisory proposition

- How are you upgrading your investment platform and processes?
- What are your biggest priorities for the years ahead?
- Is there a big disconnect between what a client needs and what they have in their portfolio today?
- Are clients overly concentrated on risky assets? Are they becoming more diversified?
- Is it likely that clients will be more interested in discretionary?
- Have portfolios performed well in recent years well by accident rather than by design?
- How do portfolios need to be restructured now?
- How will we move to a fee for service and deliver advice?
- How do we justify that fee?
- What are the services we are charging and what do clients get?

Chair

Malik S. Sarwar
CEO
K2 Leaders

Speaker

Biswajit Dasgupta
Chief Investment Officer, Head of Global Markets
Emirates Investment Bank

Shiraz Habib
Managing Director & Head of Investment Solutions
First Abu Dhabi Bank

Malik S. Sarwar
CEO
K2 Leaders

Matein Khaled
Chief Investment Officer
Asas Capital

4.15pm

Panel Discussion

Product Manufacturers – Leaders Conversation

- Is there increasing interest in ESG?
- What's the outlook for emerging markets?
- MSCI will be including Saudi Arabia in emerging markets index at some point. How will that effect you?
- Is US market over heated? Are we heading to the next financial crisis in 2020?
- Is GCC warming to index and ETF products?
- Is GOLD an interesting asset class today? What's its role in a client portfolio?
- What's the difference between physical and paper gold?

- What is the role of Gold in Islamic finance?
- How do you generate income today?
- What's the interest in;
 - Alternatives
 - Private equity
 - Hedge funds
 - Infrastructure
 - Property
 - Multi-asset portfolios

Chair

Michael Stanhope
 Founder & Chief Executive Officer
 Hubbis

Speaker

Nick Savastano
 Head of Offshore Global Life Groups and Middle East Financial Institutions
 Invesco

Oliver Kettlewell
 Head of Fixed Income & Global Portfolios
 Mashreq

Nisarg Trivedi
 Middle East Sales Director
 Schroders Investment Management

Andrew Naylor
 Head of Middle East and Public Policy
 World Gold Council

5.00pm

Closing remarks

Chairman's Closing Remarks: key learnings to apply

Malik S. Sarwar
 CEO
 K2 Leaders

5.10pm

Forum Ends