Philippines Wealth Management Forum 2016

8.40am	Registration
9.00am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
9.10am	Panel Discussion What does ‘wealth management’ mean in the Philippines today? • Who are the players? What motivates them to do wealth management? • Is it a level playing field? • Do trust banks understand their business models? What are they trying to achieve? • Do they want to be experts on pensions? And on estate planning? • Do other players in wealth management know what they want to achieve? • Are firms focusing on the strength they have? • What Initiatives do we need to help the development of the market? • Do we need to be ‘open architecture’? • Is a ‘private bank’ really relevant in the Philippines? • The Philippines still has a ‘time deposit’ mentality - how can that change? Chair Michael Stanhope Founder & Chief Executive Officer Hubbis Speaker Rafael Ayuste Senior Vice President / Group Head Trust & Investments Group BDO Unibank Josefina Tiangco Tuplano Executive Vice President, Trust Banking Metropolitan Bank & Trust Valerie Pama President Sun Life Asset Management Sun Life Financial
9.55am	Presentation Can digitisation and robo-advisory make a difference to wealth management? Sandeep Lalwani Executive Director – Europe and APAC EbixCash Financial Technology • Digital, automated advice - “robo-advisers” are likely to become a new norm • How can robo-advisory help institutions, HNWIs?

- Best practices in robo-advisory
- Human advisory versus robo-advisers. Should they co-exist?
- Distribution of funds in AMCs
- Defining a robo-advisory value proposition
- Success stories

10.05am

Presentation
New enterprise solutions for the wealth management industry

Stephen Lingard
Senior Vice President, Portfolio Manager
Franklin Templeton

- As financial institutions move away from product distribution to advisory services, the spotlight on risk management and asset allocation is growing.
- With DPM services currently limited to high network clients, how can banks and fund managers partner together to offer discretionary-like investment solutions efficiently to serve a growing emerging affluent segment in Asia?

10.15am

Panel Discussion

Compliance, regulation, tax and wealth structuring - are you confused?

- AML - meeting the challenges
- Do all institutions do their KYC seriously and consistently?
- Dealing with the reality of the regulatory burden, such as transparency and tax initiatives like FATCA and CRS - how prepared are you?
- On-boarding clients - what's the best way to improve this process?
- What challenges to both new and old wealth face in preserving and protecting their business and personal assets?
- What advice do families need in terms of investing for growth and re-generating wealth?
- Who are the right professionals and advisers to engage in meeting the compliance, tax and wealth structuring challenges? How should you choose between them?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Reynaldo Geronimo
Partner, Banking & Finance & Taxation Departments
Romulo

Steve Knabl
Chief Operating Officer & Managing Partner
Swiss-Asia Financial Services

Ida Mendoza
Trust Officer
CTBC Bank

Maria Paz Garcia
Vice President, Risk Management and Compliance
Bank of the Philippine Islands

Aaron Mullins
Managing Director, Asiaciti Trust Singapore
Asiaciti Trust

11.00am Refreshment & Networking

11.30am 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

11.40am Presentation
HNW insurance & wealth structuring is changing - here's how you and your HNW clients can benefit

David Varley
Head of High Net Worth - Asia
AXA

- One size doesn't fit all in the HNW marketplace
- Find out which HNW products match up with the differing needs of HNW clients
- By meeting your HNW clients' needs, you can secure more HNW clients, more revenue and more referrals

11.50am Panel Discussion

Enhancing the engagement with customers

- How do we get people to move from a 'savings' to an 'investment' mind-set?
- Are we adequately educating clients around investments? What can we do better?
- How do you provide training to front-liner staff? How can we improve?
- How do they sell the product?
- Do we have adequate tools to engage the customer - and help them become investors?
- Do we make people aware enough about the risks? Or just the rewards?
- Do we need a higher level of certification and professional development to be a wealth manager?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Maria Lizette Perez
Senior Vice President, Head of Private Wealth Division
Metrobank & Trust

Dr. Robert Ramos
Senior Vice President, Trust Officer and Chief Investment Officer
UnionBank of the Philippines

Anthony Campbell-Brown
Managing Director, Head of ASEAN
AG Delta2

Noel Andrada
Senior Vice President, Trust and Investments Group
BDO Unibank

Roberto Vergara
Chief Trust Officer & Head, Trust Banking Group
Philippine National Bank

12.35pm	Lunch & Networking

1.25pm Keynote Address

Developing the insurance industry in the Philippines

Atty. Dennis B Funa
Deputy Insurance Commissioner

- How the insurance industry can develop
- Policy goals and roadmap
- Priorities for the year ahead

1.40pm Panel Discussion

The development of insurance and the evolution into wealth management

- Where are the biggest opportunities and challenges for insurance companies in the Philippines wealth management space?
- How do they become more aligned and appealing to the younger generation?
- Are insurance companies engaging customers as effectively as they could? And marketing to them in a way that resonates with them?
- What is the right digital strategy? And what's the role for social media?
- How to enhance credibility and perception of agents in the eyes of consumers?
- Can the industry increase the number of productive agents - especially with younger talent?
- What can insurers do to better educate potential customers about their insurance-related needs and all the options available to them?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

David Varley
Head of High Net Worth - Asia
AXA

Thomas Henze

Head of Global Private Wealth
Swiss Life Global Solutions

Randell Tiongson
Director
Registered Financial Planner Institute

Nina D Aguas
Chief Executive Officer
Insular Life

Rizalina Mantaring
President & Chief Executive Officer
Sun Life Financial

2.25pm	Head - to - Head Q & A

Compliance dilemma

Anthony Campbell-Brown
Managing Director
AGDelta

- What do you feel are the greatest challenges for private banks and wealth managers at this time?
- What is AG Delta's approach to solving these problems?
- How does that approach differ from that of AG Delta's peers?
- AG Delta was once described by a Tier 1 bank as 'the original robo-adviser fintech'. How does that title marry up with helping the banks rather than the usual understanding of robo-advisers dis-intermediating the banks?

2.35pm	Refreshment & Networking
3.05pm	Panel Discussion

Distributing wealth management products - digital vs bricks-and-mortar

- Where and how do people most buy wealth management products in the Philippines?
- How is the product distribution process changing - or likely to change in the next few years?
- What role is there for digital platforms? How will these impact how products get sold, and the types of products offered going forward?
- How can product manufacturers as well as the banks and other wealth management firms engage the younger generation more effectively?
- What regulatory changes are needed to remove some of the overlaps and encourage product innovation?
- Does the SEC need to allow more product diversity? Is blocking new products counterproductive - especially if they have been allowed elsewhere in the world?
- What's the role of feeder funds and other ways to get more access to international markets?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

April Tan
Vice President, Head of Research Department
COL Financial

Leonardo Roxas Arguelles
Managing Director
Unicapital Group

Dhawal Kamath
Country Chief Executive Officer, Philippines, Head of Products SEA
EbixCash Financial Technology

3.50pm Panel Discussion

What's the best investment advice you can give clients today

- How can clients really build a more diversified portfolio?
- How can we educate clients to have a long term mind-set?
- How can we make the engagement with investment solutions more 'sticky'?
- How can we encourage customers to think about retirement differently?
- Life-stage financial management - what does that mean to you and your clients?
- Do clients understand the risks?
- What are the best ways to get more people invested - and investing regularly?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Federico Ocampo
Trust and Investment Group Senior Vice President, Chief Investment Officer
BDO Unibank

Clement Lee
Director, Business Development, Head of Sales - Singapore & South-east Asia
Legg Mason Global Asset Management

Phillip Hagedorn
Managing Director, Equities
ATRAM Trust Corporation

Gaurav Malhotra
Director - Capital Markets
ASK Capital Management

Michael Enriquez
Chief Investment Officer
Sun Life Financial

Carlos Jalandoni
Head of Research
Bank of the Philippine Islands

4.50pm	Forum Ends