Philippines Wealth Management Forum 2017

8.40am Registration

9.00am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.05am Panel Discussion

Building capacity and capability in wealth management in the Philippines

- What's driving growth in the Philippines wealth management market?
- What do we need to do to move faster?
- What are the needs of your clients? How can you help them?
- Onshore / offshore
- Do it yourself or partner with someone else?
- How can we develop the advisory proposition and make money out of it?
- Can we change the mind-set and educate bankers to actually think about putting the client's needs first?
- What's the training and competency framework that's relevant and most effective?
- The role of digital – does it really matter?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Dr. Robert B. Ramos CFA, CAIA, CIPM
Head of Trust and Investment Services Group
UnionBank of the Philippines

Ador Abrogena
Executive Vice President, Trust and Investments Group
BDO Unibank

Chester (Chet) Luy, CFA
Senior Executive Vice President, Head of Financial Advisory and Markets Group, and CEO and President, RCBC Forex Brokers Corporation
RCBC

Stella Cabalatungan
Executive Vice President, Head of, Private Bank - Relationship Management
BDO Private Bank

Leonardo Roxas Arguelles, Jr
President and Chief Executive Officer
Unicapital Securities

Juan Lizares
First Vice President
BDO Private Bank

	Speaker
9.55am	WealthTalk Building a future proof wealth management offering • The relevance of private banking today in Asia • The wave of consolidation: will we see more? • The challenges in building a successful and relevant offering • How to get your positioning right Sander Laugs Director of New Markets Bordier & Cie
10.25am	Presentation Emergence of digital retail wealth Sandeep Lalwani Executive Director – Europe and APAC EbixCash Financial Technology • Trends and opportunities • Impact on the industry
10.35am	Presentation Investor migration and the rise of the global citizen Scott Moore, IMCM Managing Director Henley & Partners • Global trends and developments in investor migration • What's driving investor migration for Asian HNWIs? • Key considerations for HNWIs in relation to residence and citizenship planning
10.45am	Refreshment & Networking
11.15am	Presentation Impact of a transparent world from a Philippines perspective Dicky Fong Head, Institutional Sales, North Asia Amicorp Group • What is CRS? what is FATCA? • How many countries have committed to this CRS? • AEOI – Automatic Exchange Of Information • Time for reporting, what to report? • Why would the major financial centers commit to CRS and FATCA? • How does the complaint and transparent environment affect the Philippines?

11.25am	WealthTalk	

11.25am WealthTalk

Impact investing from an Asian family office perspective

- Why do impact investing?
- What do we look for?

Tuck Meng Yee
Partner and Founder
JRT Partners

11.35am Presentation
ETF evolution

Christian Obrist
Head of iShares Distribution Asia
BlackRock

- Exchange traded funds (ETFs) have experienced explosive growth over the past decade, topping USD3.5 trillion in assets under management at the end of 2016
- Why have ETFs become so popular and what are some of the prevailing trends impacting Asia today?

11.50am Presentation
How to stay flexible in a volatile new world

Justin Wells
Investment Director
Merian Global Investors

What enables a portfolio to outperform in foul weather as well as fair? Part of the answer may be the portfolio's agility to adapt its stock selection techniques – deploying a diverse range of investment styles according to the prevailing market environment. Thereby avoiding the risk of becoming trapped by more permanent or concentrated style dependency. Justin Wells will explain how the team's alternative investment process works in different markets, but also how it contrasts with the offerings of other conventional active equity portfolios. In addition, he will also use real life examples to further demonstrate how this process works, specifically:

- How a fund manager can build a repeatable, dispassionate & unconstrained investment process to more consistently generate alpha?
- Why a more flexible approach to stock selection can adapt efficiently in very different market environments ?
- How such an approach to stock selection can generate a complimentary return structure to more style concentrated peers?

12.00pm Head - to - Head Q & A

The active-versus-passive debate

Andrew Ang
Director of Asian Sales
J O Hambro Capital Management

- Why have investors moved more passive? What is 'wrong' with the active management

industry?
- Why is JOHCM different as an active manager?
- What can JOHCM offer to investors in Philippines?

12.10pm Panel Discussion

Wealthy business families in the Philippines – how do we meet their needs?

- How does CRS and information exchange create challenges or opportunities for you?
- Is this driving clients to get advice for the first time?
- What is the current level of knowledge and activity around preserving and protecting wealth?
- How do clients currently think about succession planning? What solutions do they use?
- How can we drive more effective and specific conversations about insurance and other products or structures for inter-generational wealth transfer?
- Who are the right professionals and advisers for families to engage? And how should they choose between them?

Chair

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Chief Executive Officer & Founder
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Panel members

Patrick Cheng
Senior Vice President, Head of Trust and Asset Management
China Bank Corporation

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

Severino Sumulong
Director, Business Development
Equiom Group

Nigel Rivers
Founder and Chief Executive Officer
Capital Solutions

Angel Marie L. Pacis
Founder and President
KnowledgeLinks Wealth Solutions

Speaker

12.55pm Lunch & Networking

1.45pm Panel Discussion

Insurance – finding relevant solutions for Philippine clients

- What are the priorities for insurance companies to develop their offerings to capture more of the growth in wealth?
- How do we drive the right types of needs-based conversations with our clients?
- How do we diversify the types of insurance products and solutions we sell to our clients?
- What's most suitable to clients – such as variable products, unit-linked policies and

term?
- Where is new business going to come from over the next 5 to 10 years?
- What are the right tools and ways to engage clients today – and also the next generation?

Chair

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Chief Executive Officer & Founder
Hubbis

Panel members

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

Nina D. Aguas
Chief Executive Officer
Insular Life

Alex Narciso
Chief Agency Distribution Officer, Philippines
Sun Life Financial

Wen Yen Choo
Specialist Sales, ASEAN, Citi Private Client Solutions
Citi

Reynaldo G. Geronimo
Partner, Banking & Finance & Taxation Departments
Romulo

Speaker

2.25pm Presentation
The art of advanced structuring in wealth creation

Aaron Mullins
Managing Director, Asiaciti Trust Singapore
Asiaciti Trust

- How using offshore structures early in the wealth creation cycle can allow wealth to grow expeditiously in a near tax-free environment
- Doing this legally in the Philippines can mean paying early upfront tax charges – but this should be welcomed rather than feared or avoided
- Any efforts to try and hide assets offshore rather than legally use the options available is now a losing strategy

2.35pm WealthTalk

Regulations and business: striking a balance from a business perspective

- How to manage the compliance burden

Rafael Ayuste
Senior Vice President / Group Head Trust & Investments Group
BDO Unibank

2.45pm WealthTalk

Security in the age of uncertainty - IFCs

- Anti-globalisation and protectionism
- Role of international finance centres in Asian wealth planning
- Merits of IFCs to the global economy

Elise Donovan
Director
BVI House Asia

2.55pm WealthTalk

Taking Asia's independent community to the next level

- What's the opportunity for independent/external asset management firms in Asia?
- How to drive growth and greater industry collaboration
- Fostering best practices

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

3.05pm Refreshment & Networking

3.30pm WealthTalk

Who are the Millennials, and what do they want to invest in?

- Profiling the next generation
- Providing relevant investment choices

Steven Seow
Head of Wealth Management, Asia
Mercer

3.40pm Panel Discussion

The chicken and the egg: the asset management dilemma

- What can be done to facilitate mutual fund distribution in a meaningful way?
- Is it likely that we can deepen fund penetration?
- Instead of fishing in the same pond – how can we create new demand and interest for funds?
- Do we need to expand the product range? Especially given the simple demands of clients.
- How do we move from 'pushing' product to taking a long-term solutions-type approach?

Chair

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Chief Executive Officer & Founder
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Panel members

Augusto M. Cosio
President
First Metro Asset Management

Michael Ferrer
Managing Director

ATR Asset Management

Steve Knabl
Chief Operating Officer & Managing Partner, Swiss Asia
President, Association of Independent Asset Managers (Singapore)

Speaker

4.20pm	Presentation The question is... do you want to be known for being smart, or for being wise?

David MacDonald
Head of Learning Solutions
Hubbis

- The skills you need for a new age of wealth management

4.35pm	Panel Discussion

How will you navigate the investment markets in 2017?

- Where do you see the biggest investment opportunities and challenges?
- How do clients think today? And how do you manage their expectations?
- How will geo-political risks impact the landscape?
- To what extent do Philippines clients really want to diversify their portfolios?

Chair

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Chief Executive Officer & Founder
Hubbis

Panel members

Josefina Tiangco Tuplano
Executive Vice President,Trust Officer,Trust Banking Group
Metropolitan Bank & Trust

Michael Gerard D. Enriquez
Chief Investment Officer
Sun Life Financial

April Tan
Vice President, Head of Research Department
COL Financial

Simon Lints
Chief Executive Officer - Singapore
Cazenove Capital

Speaker

5.15pm	Forum Ends