

Full Agenda - Philippines Wealth Management Forum 2019

8.40am **Registration**

8.50am **Welcome Address**

Michael Stanhope
Chief Executive Officer
Hubbis

8.55am **Keynote Address**

Chair Opening Remarks: Why we are here!

Malik S. Sarwar
CEO
K2 Leaders

9.00am **Panel discussion**

Private wealth management - a time of dramatic change

- What can you do to improve the value proposition in wealth management?
- What does the current revenue mix of wealth managers in Asia look like? How is it changing?
- How has AML changed the Onboarding Process in the Philippines?
- What changes are we seeing in client expectations and behaviour?
- Where will the continued growth come from and what are your priorities?
- How do clients want to be serviced today?
- How can you get the right people and proposition in front of the right clients?
- The opportunities to collaborate and partner with international firms?
- How important is digital today?
- What are the main investment themes and the products that resonate with clients today?
- What's the future of Discretionary and Advisory Portfolio Management in Asia?
- Offshore / onshore. Where is the long-term opportunity?

Chair

[Michael Stanhope](#)
Chief Executive Officer & Founder
Hubbis

Panel Members

Maria Paz A. Garcia
Chief Risk & Compliance Officer, Risk Management & Compliance
BPI Asset Management & Trust

Albert S. Yeo
President
BDO Private Bank

Robin Heng
Global Market Head - Indonesia, Philippines, Thailand and Indochina
Bank of Singapore

Valerie Pama
President
Sun Life Asset Management

Philipp Piaz
Partner
Finaport

Christian Senn
Managing Director, Market Group Philippines Market
Credit Suisse Private Banking

Malik S. Sarwar
CEO
K2 Leaders

9.45am

Presentation

Transforming Wealth Management for the Future

Abhra Roy
Head, Finacle Wealth Management Solution
Infosys Finacle

- Redefining wealth management for 2019 and beyond
- Future Proofing your Business with a Truly Digital Platform

9.55am

Head - to - Head Q & A

Global Citizens: Trends and Developments in Investment Migration

Scott Moore, IMCM
Country Head Philippines
Henley & Partners

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

10.05am

Presentation

Private Banking: A new point of view

Evrard Bordier
CEO and Managing Partner
Bordier & Cie

- Building a private bank: 3 strategic questions
- Pillars of building a private bank
- The partnership approach

10.15am

Presentation

Cyprus Island of Opportunities

Ioannis Ioannikiou

Legal Advisor
Casamont Cyprus

- Cyprus Investment Program
- Benefits of Cyprus when structuring your wealth
- Cyprus investment opportunities

10.25am

Panel discussion

Platforms and Technology - the future of private wealth management?

- The rise of Wealth tech in Asia – whats working and not working?
- Are banks going in the right direction in their digital journey?
- How can they implement a digital transformation strategy?
- What digital expectations do clients have?
- Has the investment in 'digital' justified the cost? What has worked elsewhere?
- The chicken and egg? Can you sustain the digital strategy for the bank?
- Transparency, Margins, Costs and Fees – what's changing?
- How must we tweak the investment engine? Can it be automated? Should it be more passive?
- How do we deliver 'funds' and investment products to our clients efficiently?
- What does the word 'platform' mean to you?
- Connecting customer data to market data – what does this mean?
- What's the role of technology and AI?
- Are FinTech's and Tech Giants threatening our business model yet?
- What disruptors have we seen? Have any been successful?

Chair

[Michael Stanhope](#)

Chief Executive Officer & Founder
Hubbis

Panel Members

Anthony Thomas

Chief Executive Officer
Mynt

Edison Tsai

Partner & Executive Director
SeedIn Technology

Damian Hitchen

Chief Executive Officer, Middle East & Asia
Swissquote

Michael Ferrer

Managing Director
ATR Asset Management

Simon Wong

Sales Head, Greater China Region
ERI Banking Software

11.10am

Refreshment & Networking

11.35am

Presentation

Food for thought: CRS / AEOI – Practical experiences

Ivan Pelle

Executive Director - International Taxation
RGN

- CRS Common Reporting Standard – Developments - Participating vs Permanent Non-Reciprocal Jurisdiction
- AEOI Automatic Exchange of Information - Transparency & Tax Planning – Territorial vs WWI taxation
- Citizenship or residency by investment program – Today's complexities, the future? Solutions?

11.45am

Presentation

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

Andreas Wenger

General Manager, Asia Pacific
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

11.55am

Presentation

Digital Client Onboarding & E KYC

Sachin Gawade

Director Sales | Asia Pacific
EbixCash Financial Technology (Formerly Miles Software)

- Hassle free on-boarding
- Touching Untapped markets
- Quick and Easy
- Digital Wealth Management

12.05pm

Presentation

The importance of Gold as a strategic asset

Joshua Rotbart

Managing Partner
J. Rotbart & Co.

- Why gold? Why now?
- Trends in physical gold
- Use cases

12.15pm

Presentation

Outlook for Emerging market equities

Rob Mumford

Portfolio Manager, Emerging Markets Equities
GAM

- Implications of recent changes in global growth forecasts
- What are monetary indicators (yield curve etc) telling us
- Role of China in the global growth story
- Outlook for China and Asian emerging growth and equity markets

12.25pm

Presentation

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

David Varley

Chief High Net Worth Officer, Sun Life Hong Kong
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

12.35pm

Panel discussion

The increasing importance of wealth solutions and planning

- What challenges do wealthy families have and how is that changing?
- Are we ready for the intergenerational wealth transfer?
- How will The TRAIN law affect wealth transfer by Filipinos in the Philippines?
- What are the effects of transparency on the conversation with clients?
- How can we make the most of the opportunity that Wealth Planning and Structuring represents to us?
- Any other emerging opportunities in wealth management?

Chair

[Michael Stanhope](#)

Chief Executive Officer & Founder
Hubbis

Panel Members

Stella Cabalatangan

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

Angel L. Pacis

Founder, President
KnowledgeLinks Wealth Solutions

Irene Lee

Business Development Director, Intermediary and Partnership
Hawksford

Ivan Pelle
Executive Director - International Taxation
RGN

Sebastien Hayoz
Managing Director
Asiaciti Trust

13.15pm

Lunch

13.50pm

Room A – Workshop

Global Citizens: Trends and Developments in Investment Migration

- Introduction to the Investment Migration Industry
- Citizenship-by-Investment: Travel and Settlement Freedom for HNWIs
- The world's leading Residence-by-Investment Programs

Scott Moore, IMCM
Country Head Philippines
Henley & Partners

13.50pm

Room B – Workshop

Enhancing your impact to delight clients!

- Five habits of effective advisers
- Sales manager as effective leaders and coaches.
- How do you engage clients in challenging markets?
- Where is the return now?
- Simple solutions to discuss with clients today

Malik S. Sarwar
CEO
K2 Leaders

14.30pm

Room B – Workshop

Accelerating Digital Wealth Management and Bancassurance

- Empowered, Digital Financial Advisory
- Digital journeys for Advisors and Clients
- A Digital Core Wealth Management engine for mid and back office operations

Abhra Roy
Head, Finacle Wealth Management Solution
Infosys Finacle

14.30pm

Room A – Workshop

The World of Physical Gold

- Gold, what is it all about?
- Gold and its role in an investment portfolio
- Physical gold Vs. "Paper gold" and ETFs
- How to buy gold and other precious metals?
- How to store and how to insure your holdings?
- Know your gold bar - inspecting real gold bars and coins

Joshua Rotbart
Managing Partner

J. Rotbart & Co.

15.10pm Refreshment & Networking

15.30pm Panel discussion

Investing in more uncertain and challenging markets

- Are we becoming more international in our investment thinking?
- Regulation and compliance – what developments?
- Impact of the new Tax Law on Investment Funds?
- Challenges and Opportunities for Unit linked insurance in the Philippines?
- How are you thinking about fund selection and portfolio construction?
- How has the Investment environment changed in Asia from 2017 to 2019?
- 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?
- Whats the outlook for emerging markets?
- What is interesting in the fixed income and credit universe today?
- Is the Philippines warming to index and ETF products?

Chair

[Malik S. Sarwar](#)

CEO

K2 Leaders

Panel Members

Dr. Robert Ramos

Senior Vice President, Trust Officer and Chief Investment Officer
EastWest Bank

Roberto Vergara

First Vice President & Head of Trust
Philippine Veterans Bank

Michael Gerard D. Enriquez

Chief Investments Officer
Sun Life Financial

Rob Mumford

Portfolio Manager, Emerging Markets Equities
GAM

Adeline Tan

Head of Investment Advisory
Mercer

16.15pm Presentation

Are You Future-proofing Yourself?

David MacDonald

Head of Learning Solutions
Hubbis

- Leveraging AI In Your Business
- The Human Skills That Might Help Keep You Relevant
- What's Your Strategy & Plan?

16.25pm

Closing remarks

Key Takeways

Malik S. Sarwar
CEO
K2 Leaders

16.30pm

Forum End

Workshops