PHILIPPINES WEALTH MANAGEMENT FORUM 2023

8.30am	Registration

8.55am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.00am Panel Discussion

Wealth Managers - Survive and Prosper in the new world

- How is the asset & wealth management industry evolving in the local market?
- What are the trends and developments we are seeing in Asian private wealth management?
- What growth potential lies ahead, and where are the key opportunities for the foreseeable future?
- Fees are being pushed down by investors and regulators – how will wealth managers survive?
- What has to change in the industry if it is to survive and prosper?

Chair

Scott Moore, IMCM
Managing Director
Henley & Partners

Speaker

Albert S. Yeo
President
BDO Private Bank

Kees Stoute
Regional Private Banking Chief Operating Officer
EFG International

Roberto Martin S. Enrile
Head of Private Wealth Client Relationship Management
Bank of the Philippine Islands

Dr. Robert Ramos
President & CEO
RCBC Trust Corporation

9.30am Presentation
Wealth as a Service: Looking beyond the "Crazy Rich Asians"

Yash Shah
Partner
Synpulse

Global wealth managers are heavily investing with a laser focus on capturing the growing HNWI population in Asia's emerging markets. The local universal banks are revamping their client segments to provide tailored advisory services to the wealthy. But are the resources being allocated towards the correct target client base? Are we missing the accelerated growth of a particular wealth segment which will overshadow the HNWI wealth base in the near future? Let's look beyond Asia's crazy rich and understand how WMs are gearing up with innovative wealth operating models to capture, service and retain this underserved population.

9.45am

Panel Discussion

Evolving the Platform and Proposition

- How have you been evolving your platform, processes, and products?
- What are the changing expectations of clients?
- How does this help you in the curation and delivery of advice?
- Have you made any real progress in your digital journey?
- How does digital improve your traditional value proposition?
- What are the products and services you could offer? How can your proposition evolve?
- What is you view on separate platforms that offer wealth management - external to a bank?
- What do you think about digital assets?

Chair

Pieter Zylstra
General Manager - APAC
additiv

Speaker

Marcy Kohchet-Chua
Chief Client Relationship Officer
ATRAM

Peter Faulhaber
Head of Wealth and Personal Banking - Philippines
HSBC Bank

Kees Stoute
Regional Private Banking Chief Operating Officer
EFG International

10.15am

Presentation
Millionaire Migration, Climate Change, and where your Grandchildren will live in 100 years

Scott Moore, IMCM
Managing Director
Henley & Partners

- Millionaire Migration – where did HNWI relocate in 2022 and where are they going in the future?
- Climate Change – where will your grandchildren live in 100 years
- Hedging Sovereign Risk through domicile diversification

10.30am

Panel Discussion - in partnership with Henley & Partners

Current Trends and Concerns for International Families

- How do you use offshore wealth structures? What are some of the risks?
- How can you protect assets and wealth for the next generation?
- What will be the effect of CRS?
- What is the effect of beneficial ownership transparency?
- Which centres are likely to be most attractive in the future?
- What is the difference between a will and trust in Singapore?
- What are the trends around citizenship and migration?
- Can a local court challengs the validity of an offshore structure holding local Filipino assets?

Chair

Maita Kilayko
Director
Henley & Partners

Speaker

Stella Cabalatungan
Executive Vice President
BDO Private Bank

Woon Shiu Lee
Managing Director & Group Head of Wealth Planning, Family Office & Insurance Solutions
DBS Private Bank

Zac Lucas
Partner – International Private Wealth
Spencer West LLP

Joshua Gilbert F. Paraiso
Partner
PJS Law

11.00am Refreshment & Networking

11.30am Presentation
Embedded Wealth opportunity in the Philippines

Pieter Zylstra
General Manager - APAC
additiv

- Evolution of embedded wealth
- Focus on customer needs
- Grow your businesses with embedded wealth in the Philippines

11.45am Head-to-Head Interactive Q&A

The Development of the Independent Wealth Model in Asia

- Why have we seen an evolution of the independent wealth model in Asia?
- When did it all start in Singapore and Hong Kong what are the business models?
- What are the advantages for clients?

Philipp Piaz
Partner
Finaport

Jessica Cutrera
President
Leo Wealth

12.00pm	Panel Discussion

Curating winning client portfolios following a challenging year

- What are the opportunities and challenges for the year ahead?
- How are you managing risk in 2023? Is it time to take on more risk?
- What's your favourite asset class now?
- How are you generating income for clients?
- What's your view on alternative investments? Digital assets? Private Markets?
- How do you choose the right investment partners?
- How can you consistently deliver performance and differentiate your offering?

Chair

Yifei Li
Managing Director, Institutional Sales
Alta

Speaker

Michael Gerard D. Enriquez
President and CIO
Sun Life Investment Management and Trust Corporation

Rex Mendoza
Managing Director
Rampver Financials

Gautam Sharma
Senior Vice President and Retail Bank Sales Network Head
Unionbank

Caesar Antonino M. Ordonez Jr.
Head of Investments, Private Banking Group
UnionBank of the Philippines

Jason Gibbons
Investment Director, Asia
Leo Wealth

12.45pm Presentation
Providing the best service to your customers

Shaun Paterson
Country Manager - Philippines
Chelmer

- Understanding your customer's needs
- Helping your customers to help themselves
- Giving RMs the right tools to drive business

1.00pm Lunch & Networking

2.00pm Forum Ends