# PHILIPPINES WEALTH MANAGEMENT FORUM 2024

8.30am Registration

8.55am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.00am Panel Discussion

Trends, Opportunities and Challenges for the Industry

- What is the Evolution of the Private Wealth Management Landscape?
- What are the Challenges and Opportunities?
- What are the emerging trends and future expectations of clients?
- International Firms - competition or collaboration?
- Which business model is best?
- What are the effective methods for identifying and attracting top talent in the wealth management industry? How are you Finding, Training, Retaining, Empowering and Motivating your top performers?
- Your key priorities for the year ahead

Chair

Maita Kilayko
Director
Henley & Partners

Speaker

Albert S. Yeo
President
BDO Private Bank

Arlene Agustin
Senior Vice President, Private Banking Head
UnionBank of the Philippines

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

9.30am Presentation
Wealth Migration, BRICS Influence, and University Degrees with a Passport

Scott Moore, IMCM
Managing Director
Henley & Partners

- 2023 score of countries with the largest inflows and outflows of millionaires
- BRICS Wealth Report
- How to graduate with a degree and a passport

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| 9.45am | Panel Discussion |

Evolving the Platform and Proposition: Improving the Client Experience

- Private wealth managers constantly face challenges related to regulation, competition, and changing customer expectations, but they also have significant opportunities to leverage technology for digital transformation, better customer experiences, and increased efficiency.
- What is the future of wealth management in the digital age?
- What is the role of technology and digital tools in modern wealth management for HNW clients?
- Success Stories and Case Studies - Digital Transformation Strategies?
- What are the best Client-Centric Approaches?
- Artificial Intelligence or Emotional Intelligence – which is more important?
- What's the priority? How are you allocating your resources? Enhanced Customer Experience, Data Analytics, Automation, and FinTech Partnerships.

Chair

Anurag Pandey
Head of APAC Market
additiv

Speaker

Dr. Robert Ramos
President & CEO
RCBC Trust Corporation

Ramon Melchor Tejero
President and CEO
UnionBank Financial Services and Insurance Brokerage

Deanno Basas
CEO of Digital
ATRAM

10.15am Presentation

Reimagining the Financial Services Value Chain through Embedded Finance

Anurag Pandey
Head of APAC Market
additiv

- How embedded finance is reshaping the financial services landscape.
- Consumer preferences for cost-effective, tailored and engaging financial solutions.
- How platform economics make serving the mass-market viable.
- Success stories and strategic imperatives for financial and non-financial institutions.

10.30am Panel Discussion

Wealth Planning and Structuring – Understanding the Needs of Our Clients

- What is the best structure where a client has multiple 1st, 2nd and 3rd families? What are the risks that will need to be avoided?
- What are the challenges faced by UHNW Families today?
- What is the importance of addressing family dynamics and governance structures within UHNW families to ensure long-term wealth preservation?
- Share real-life case studies and success stories of UHNW families who have effectively

structured their wealth.
- What should a client take into account when considering whether to transfer the family business to the next generation?
- When is the right time for a business family to consider a family office?

Chair

Zac Lucas
Partner – International Private Wealth
Spencer West LLP

Speaker

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

Joshua Gilbert F. Paraiso
Partner
PJS Law

Stella Cabalatungan
Executive Vice President
BDO Private Bank

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| 11.00am | Refreshment & Networking |

11.30am — Presentation

Re-Imagining the Wealth Management Journey: How Advisors Play a Key Role

Mathieu Cambou
Chief Product Officer
Evooq

- What makes a good wealth management journey and why is it important?
- What are the preferences of Asian Wealth Management clients?
- How do we simplify the wealth journey and empower the advisors at the same time?

11.45am — Presentation

Time to Go for Bargain Hunting in China?

Rebecca Chua
Managing Partner
Premia Partners

- Are we at the bottom yet – is deep value cheap enough?
- The next China is China - what does this mean and what are the important emerging trends to monitor?
- Where will you find value and value for growth in the next 12 months?
- Which ETFs are the best implementation tools?

12.00pm — Panel Discussion

Curating a Relevant and Professional Investment & Advisory Proposition for Private Clients

- What are the local market and also international investment scenarios, the outlook ahead, and where they see the key opportunities?
- What are the major regulatory impediments facing HNW investors in terms of developing a fully global investment allocation?
- In terms of allocations to mainstream public market assets (equities and fixed income), are HNW clients more focused on active or passive strategies?
- What sort of demand amongst HNWIs for private and alternative assets, and what is the outlook?
- Is ESG a key driver for investment choices amongst wealthy private clients? Why, or why not?
- Is there strong local demand amongst HNW clients for fee-based advisory, or discretionary portfolio management, or do clients there tend to want to retain control of their investment decisions? What are the trends?
- Generally, how is the wealth management industry evolving and adapting to deliver the best investment and advisory offerings to HNW clients?

Chair

Alex Ng
Head of Intermediary Sales, Asia
Janus Henderson Investors

Speaker

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

Jason Gibbons
Investment Director, Asia
Leo Wealth

Tomas S. Chuidian
President
BPI Investment Management

12.30pm

Presentation
The Role of Gold in a De-Dedollarized World

Joshua Rotbart
Managing Partner
J. Rotbart & Co.

- Physical gold vs paper gold
- Recent cases of gold used as an alternative to USD
- Gold performance and how Filipino affluent clients benefit from gold in their portfolio

12.45pm

Presentation
Benefits of Using Foreign Trusts for Wealth Filipino Families

Sharon Yam
Country Head, Ocorian Singapore, Head of Private Clients
Ocorian

- How can foreign trusts be used as a tool for wealth structuring?
- The benefits for of the foreign trust.
- Protection, Jurisdiction, Confidentiality – what are the drivers?
- Singapore Foreign Trust highlights

1.00pm Lunch & Networking

2.00pm Workshop - Spencer West

Philippine Global Families: Key Domestic and International Legal, Tax, and Regulatory Developments Affecting Global Philippine Families

Joshua Gilbert F. Paraiso
Partner
PJS Law

Marie Cherylle Z. Hular
Partner
Salvador Llanillo & Bernardo

Sharon Yam
Country Head, Ocorian Singapore, Head of Private Clients
Ocorian

Zac Lucas
Partner – International Private Wealth
Spencer West LLP

Stella Cabalatungan
Executive Vice President
BDO Private Bank

- Philippine tax update, including the status of the Common Reporting Standard (CRS) and Foreign Account Tax Compliance Act (FATCA), General Tax Amnesty and Banking Privacy;
- International anti-money laundering status of the Philippines, and key Financial Action Task Force (FATF) developments including need for Philippines to establish a register of foreign and domestic trusts;
- US Foreign Grantor Trust developments, including possible invalidity if trust created in traditional trust jurisdictions, such as Singapore or Hong Kong, what are the risks and what steps can be taken to mitigate the risk of invalidity;
- Family Charters and possible unintended legal consequences in the event of family shareholders dispute;
- Second Passports and Philippine Succession Law, possible estate planning options, whether common law passport (St. Kitts, Saint Lucia, Grenada, Antigua) can override domestic Philippine civil law succession;
- Philippine marriage and whether foreign courts in Singapore, Hong Kong or BVI would recognize and enforce matrimonial community property rights?

3.00pm Forum Ends