Redefining the Digital Evolution in Wealth Management

8.40am	Registration
9.00am	Welcome Address Camilla de Villiers Global Head, Digital Solutions, Regional Head, Wealth Management, EMEA & Asia Lionbridge
9.10am	Panel Discussion How you can make digital matter • Everyone is 'going digital,' but just what does that mean? • Are you making the most of the technologies and channels which exist? • How do you need to change the way you think about the business? • What challenges do firms face when they extend an adviser-based business model with digital capabilities? • Is the investment and time really worth it? • What impact will the growth of the fintech industry have on traditional wealth managers? • Digital is not just a client-facing opportunity – how can firms use analytics and big data to gain a competitive edge? • Who will be the winners and losers in 5 to 10 years' time? Chair Robert Agnew Partnership Director, North Asia Thomson Reuters Speaker Peter Rutherford Director, Information Technology UBS Terence Tam Executive Director, Head of Wealth Management Technology, Asia ex-Japan, Global Information Technology Division Nomura Julian Webb Head of Data Management and Analytics, SS&C Anova SS&C GlobeOp Clive Smith Head of Sales, Asia Pacific Assentis
9.55am	Presentation Crowd investment Philippe El Asmar Partner, Head of Business Development Amareos

- What's happening in this space?
- Opportunities and challenges

10.15am Presentation

Creating a new investment experience

Hrvoje Krkalo
Executive Director
Leonteq

- Redefining the origination and distribution of investment products in Asia through automation
- New partnership mode

10.35am Refreshment & Networking

11.05am Panel Discussion

The fintech phenomenon – does it have any real substance?

- Are mobile, digital and social media trends reshaping wealth management to any significant extent yet?
- Do fintechs have the potential to ever challenge for real market share?
- Where is the biggest scope for disruption?
- What is the role for fintechs in wealth management of tomorrow?
- What's the likely influence of robo-advisers in 10 years' time?
- Rather than competing head-on – are there any immediate opportunities for disruptive technologies to provide private and retail banks a way to extend their value proposition?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Alex Ypsilanti
Chief Executive Officer and Co-Founder
Quantifeed

Mathias Helleu
Executive Chairman
8 Securities

Dominic Gamble
CEO & Co-founder
findaWEALTHMANAGER.com

Juwan Lee
Lead Founder and CEO
NexChange

Sameer Chishty
Chief Executive Officer, Managing Director
Streeton Partners

Seamus Donoghue
Vice President of Business Development
Allocated Bullion Solutions

Renu Bhatia
Co Founder
Asia Fintech Angels

11.55am

Presentation
Precious metals - waiting for the technology revolution

Seamus Donoghue
Vice President of Business Development
Allocated Bullion Solutions

- Why can't you trade physical gold on your current client platform?
- Physical vs paper - key differences
- Is the market broken: is telephone-based trading the future?
- Electronic trading and post trade - what we can learn from other asset classes?
- Key considerations for private banks trading gold

12.15pm

Panel Discussion

Creating a culture of innovation

- Do banks and other incumbents in wealth management have the people, culture and mind-set needed to adapt and thrive against the digital players likely to enter this space?
- What's the secret to being able to continually reinvent your business?
- How do the more forward-thinking firms doing to achieve this?
- How does cultural innovation relate to people, teams and risk-taking in terms of new thinking and decision-making?
- How can banks and other traditional financial services / wealth management institutions achieve this – especially since they have to move quickly in today's competitive landscape?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Paul Mais
Head of Business Process and Prioritisation, Retail Banking and Wealth Management Asia Pacific
HSBC Bank

Marko Milek
Head of Global Exchange, APAC
State Street

Aaron Perryman
Partner, Financial Services Advisory
EY

Luke Waddington
Head of GM APAC Electronic Business, Global Markets

BNP Paribas

1.00pm Lunch & Networking

1.50pm Panel Discussion

Driving the digital revolution in insurance

- How are emerging digital and other technologies reshaping the way insurance companies connect with customers?
- What does it take to leverage technology to drive customer acquisition and retention across multiple distribution channels?
- How can insurance companies create a competitive advantage through investment in technology and data-driven insights about customers?
- How can the customer experience be improved?
- How can social media facilitate personalised customer engagement? To what extent can you reach new markets using social channels?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Valerie Bruce
E-Business Specialist
Quilter International

Ben Worthington
Principal, Head of Business Development & Sales
Mercer

Mark Wales
Chief Executive Officer
Galileo Platforms

Marco Kamerling
Associate Partner & Managing Director
Synpulse

2.25pm Refreshment & Networking

2.35pm Presentation
How to cope with complex interactions between content, case-workers and business resulting from going digital

Mark Buesser
Chairman
IMTF

- Going digital is migrating back-end activities to the front
- Coping / automating challenges from Compliance-, Tax-, Cross-Border- and Suitability-requirements
- Each case requires unique handling!
- Reducing time & complexity with IMTF's case management framework & content

3.25pm Panel Discussion

How to keep up with the advisory and platform revolution

- What is having the biggest impact on the role and delivery of investment products and advice in wealth management?
- There are many platforms from many vendors – how can firms coordinate these platforms and information / data?
- Can asset managers compete with robo-advisers in a more rational and regulated world in relation to fees and performance expectations?
- What is needed to enhance relevance and context – and control – for client portfolios?
- Where will the next mobile wave of investment product come from?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Panos Archondakis
Executive Director, Group Technology
UBS Global Wealth Management

Robert Rooks
Partner, Financial Services Industry
Deloitte

Mark Munoz
Marketing
Contineo

Andrew Hardie
Principal, Hong Kong
BCG

4.05pm Panel Discussion

Innovation: where next for technology in wealth management?

- What tools or services will wealth managers of tomorrow need stay ahead?
- How can banks and other wealth management players better service client obsessions with smartphones and tablets?
- Design or functionality – which is more important? What will be the challenges in implementing new solutions?
- The client experience of the future: how can you more actively involve the clients along the entire advisory process through the way they use online and mobile channels?
- What does the next generation want from their wealth management experience? To drive the tools and services of tomorrow?
- Where's the balance between self-service banking and traditional wealth management?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Stanley Yu
Director, Group Technology
UBS Global Wealth Management

	Mark Buesser Chairman IMTF
	Daniel Chia Co-Founder Call Levels
4.45pm	Forum Ends