

# State of the IWM Market and Devising the Best Models for the Future

3.00pm

Independent Wealth Management: State of the Market and Devising the Best Models for the Future

- What are the key developments that have been driving the evolution of the independent wealth management sector in recent years?
- Are more new entrants arriving, or is there consolidation in the sector, or are some players exiting, and why?
- Are private clients in Asia migrating more towards to big brand names such as the global, boutique or regional banks, or further towards the independent model, and why?
- Can Asia's independent wealth sector really grab a much larger share of the AUM, as has been happening for example in Switzerland?
- What are the vital factors to consider when establishing or upgrading an independent wealth firm?
- How do these smaller independents leverage outsourced digital platforms and other partners to offer a truly global product and advisory suite to clients?
- Do the independents work only with the private banks for custody or are there more and better alternative solutions they should consider?
- What is required in order to win more DPM and advisory business from clients?
- How do you make sure the right licenses are obtained and how long might that take?
- How do these businesses cope with the constant, stringent and ever-increasing regulatory demands?
- What are the right fee models, and are retrocessions still part of the overall picture?
- How do you attract and retain talent to expand in the future?
- How do the independents win the hearts and minds of today's clients and the client of tomorrow?
- Should there be more partnerships and consolidation in the independent sector?
- How do these players acquire, outsource and employ technology and digital solutions most efficiently and within their resources?

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4.00pm

Webinar Ends