Taiwan Wealth Management Forum 2016

8.40am	Registration
9.00am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
9.10am	Panel Discussion What's ahead for the wealth management industry in Taiwan? • Taiwan is full of potential for wealth management – where are the biggest opportunities for you? • How can you make the most of the expected doubling of HNW individuals in Taiwan by 2020? • As the different business models and platforms evolve – will one of them win out, or is more of a blended approach the right way to go? • The ageing population or the young & agile – which client segment do you need to focus on today to be profitable tomorrow? And how should you tailor your offering? • Is there scope to move towards more of a financial planning-type approach – and develop the IFA offering? Is this important in Taiwan? • How can we better educate customers and get them prepared for a more transparent world? Chair Michael Stanhope Founder & Chief Executive Officer Hubbis Speaker Albert Lee Chief Executive Officer, Global Retail Banking CTBC Bank John Huang Chief Executive Officer, Private Banking Cathay United Bank Olivier Rousselet Country Manager Taiwan BNP Paribas Wealth Management Dennis Ko Managing Director, Head of Investment Products and Services, Taiwan UBS Global Wealth Management
9.55am	Presentation Best practices in Asian wealth management Albert Lee Chief Executive Officer, Global Retail Banking

CTBC Bank

- The business model of wealth management must change together with the change of market
- Two main guiding principles: client-focused, and profitability and growth
- Legal and compliance

10.10am Presentation

US growth equities – reasons to be bullish… making America grow again

Don Klotter
Managing Director,
EFG Asset Management

- The likely impact on the markets in the world of Donald Trump as the next US President
- What will be the investment opportunities in this environment?

10.25am Panel Discussion

Asset management - what's the right onshore/offshore mix?

- The likely impact on the markets in the world of Donald Trump as the next US President
- What will be the investment opportunities in this enviWhat are the biggest opportunities and challenges for the asset management industry in Taiwan?
- With so many offshore and onshore providers – how can you stand out?
- Tightening regulations are well-intended to protect investors and ensure best practices. What will help the market become more transparent and robust in reality?
- How does distribution need to evolve? Do we need direct sales channels or a broader range of intermediaries?
- What's the best approach to reach the end-user most effectively and cost-efficiently?
- How do we cater to changing investor behaviour?
- Diversification is key – what are the themes which will shape investor appetite over the next 5 years?
- Is there any real scope for ETFs?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Jeff Chang
Chairman
SITCA

Francine Wu
Investment Management
Schroders Investment Management

Dennis Ko
Managing Director, Head of Investment Products and Services, Taiwan
UBS Global Wealth Management

11.10am Refreshment & Networking

11.40am Presentation

Surfing the wave of wealth management digitalisation! The trend, the challenges and the opportunities!

Sean Pien
Representative Director and Site Leader
Thomson Reuters

- The trend and impact from fintech disruption and wealth management digitalisation
- What clients need and what we could provide – the challenges ahead
- Open platform in a professional world – wealth management digitalisation ecosystem and best practices
- Embrace opportunities!

11.55am Presentation

Jeson Liu
Head of Greater China
FinIQ

12.10pm Presentation

Digitalisation of wealth management

Shyh Jih Lee
Business Solutions Manager, Asia
ERI

- Global challenges in wealth management
- How can digitalisation address these challenges?
- Security

12.25pm Panel Discussion

Moving towards a fintech future - how can you re-shape distribution and the client experience?

- What does 'digital' mean for wealth management in Taiwan?
- As institutions look to create Bank 3.0 – how can you do it in practice?
- What more should the regulators do to ensure Taiwan keeps up with other Asian markets?
- How far will fintech really re-shape the look-and-feel of wealth management in Taiwan?
- To what extent can digital help improve selling practices and address other challenges, such as excessive manual inputs and paper burdens?
- What can we do to improve the online and mobile tools to engage the customer?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Pradeep Pant
Head of Retail & Private Banking, Taiwan

ANZ

Sean Pien
Representative Director and Site Leader, Taiwan
Thomson Reuters

Steven Seow
Head of Wealth Management, Asia
Mercer

1.10pm	Lunch & Networking

2.00pm Panel Discussion

Best practices in Asian wealth management - who is getting it right?

- What are the trends in wealth management across Asia?
- What is the stage of development of the industry in the more developed hubs of Hong Kong and Singapore?
- How are banks now doing business to ensure they are fully compliant and prepared for the reality of tax transparency?
- How is wealth management evolving in onshore markets in Asia?
- What are some of the steps that regulators across Asia have taken to facilitate industry growth?
- What's the role that Hong Kong and Singapore will play in future access to Taiwanese wealth?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Tuck Meng Yee
Partner and Founder
JRT Partners

Olivier Rousselet
Country Manager Taiwan
BNP Paribas Wealth Management

Steven Seow
Head of Wealth Management, Asia
Mercer

2.45pm Presentation
Residence and citizenship planning for families - an overview

Jennifer Lai
Managing Partner, Head of North Asia
Henley & Partners

- Why do families relocate?
- What should HNW families consider when carrying out residence and citizenship planning?
- Current developments in residence and citizenship programmes

3.00pm	Panel Discussion

How to deliver a relevant offering to your clients

- What skill-set, knowledge base and mind-set do bankers and advisers need to be successful in advising wealthy individuals?
- What should be your role in educating clients?
- How can you have a proper needs-based conversation with your clients?
- What's the broader relationship you should strive for with these clients – especially the next generation?
- What behaviours build trust with these clients?
- How is your role likely to evolve or change going forward?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Jennifer Lai
Managing Director, Hong Kong
Henley & Partners

Anny Lin
Head of Wealth Planning, Investment Products & Services
UBS Global Wealth Management

Hui-Chin Chen
Co-Owner and Financial Planner
Pavlov Financial Planning

Peter Brigham
Director
Rosemont

3.45pm Forum Ends