Full Agenda - Asian Wealth Management Forum 2017

8.40am **Registration**

9.00am **Welcome Address**

Michael Stanhope
Chief Executive Officer
Hubbis

9.05am **Panel discussion**

What does Asia mean to you?

- What key trends are we seeing in wealth management / private banking in Asia?
- Is the opportunity as large as we all think? How do we maximise its potential?
- What's the real story behind the development of wealth management in Asia?
- How can you scale your business in Asia in a sustainable and profitable way?
- How do you access Asia's ever-growing numbers of HNW and UHNW?
- How is the balance between offshore and onshore wealth developing? How are local banks competing in the HNW space?
- How is wealth management developing in the big markets, like India and China?
- Given the wave of consolidation – what is the future for international private banking in Asia?
- Who are the leading players today? Who will be the successful firms of tomorrow?
- How is the independent model developing in Hong Kong, Singapore – and elsewhere? Will it ever gain any real traction?

9.55am **Presentation**

Finding the right life insurance solutions for HNW customers

Thomas Henze
Head of Global Private Wealth
Swiss Life Global Solutions

- What suits Asian clients?
- How can these be best positioned?

10.10am **Presentation**

Whose assets are they anyway?

Peter Brigham
Director
Rosemont

- Issues surrounding the legal ownership and title of financial assets

10.25am **Presentation**

Singapore & Hong Kong as Asian wealth management centres & overview of CRS and

AEOI

Irene Lee
Head of Business Development, Singapore
Equiom Group

- Overview – Asia in general
- Singapore and Hong Kong as wealth management centres
- Singapore & Hong Kong companies
- Brief summary on CRS & AEOI
- Other estate planning tools

10.40am	**Refreshment & Networking**
11.10am	**Presentation**

Wealth TALK Why transparency is key

Markus Grossmann
Managing Director
Trident Trust

- Trends in the use of private trust companies in Hong Kong and Singapore
- Why the jurisdictions matters
- How can we service clients and keep them happy?
- How do we service Chinese investors looking to access European assets?

11.25am **Presentation**

Driving growth through digital wealth management

Mahesh Bulchandani
Chief Executive Officer, Asia Pacific Operations
FinIQ

- Delivering a client-centric wealth management offerings
- Creating a unified front-to-back office platform

11.40am **WealthTalk**

On-boarding Asian clients - how can you get this right?

- The optimal onboarding / client lifecycle model for private banks / family offices / wealth mangers
- Client maintenance from a AML and regulatory perspective

Elizabeth MacDonald
Director
EY

11.55am **WealthTalk**

Financial planning – is it relevant for Asian HNW & UHNW clients?

- Understanding where financial planning advice adds client value and creates revenue

- opportunities
- Key enablers – experience from different markets

Mark Glover
Global Head of Financial Planning, Wealth Management
HSBC

12.10pm **WealthTalk**

The winners and Losers in Asian Wealth Management. Will it include the Swiss?

- Who wil be the winning institutions in the next five years
- Will the Swiss finally abandon Asia like the foreigners have abandoned Switzerland?
- Is the digital revolution the end of the old offshore model?

Ray Soudah
Founder
Millenium Associates

12.25pm **Panel discussion**

How can we create the connectivity with Asia to tap this golden opportunity?

- What's the role of Switzerland in Asian wealth management today?
- With whom do you connect – and with whom can you partner – to make the most of this opportunity?
- How do you access and advise wealthy families from Asia?
- The biggest opportunity in our lifetime is the vast amount of wealth being 'offshored' from China – how can you make the most of this?
- In the face of changing regulations and the impact on the types of structures that are now relevant – what's the best advice and which solutions make most sense for Asian clients?
- On-boarding Asian clients – what are the issues you will face? What should you be aware of?
- How can European-based wealth managers be better prepared, with more relevant offerings, to service Asian clients – either in their home markets, or when Asian clients venture to Europe?
- What are the regulatory and compliance issues you need to understand?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Geralda Buckley
Managing Partner & Founder
HP Wealth Management

Loic Pitrou
General Manager, Asia Pacific
additiv

Irene Lee
Head of Business Development, Singapore
Equiom Group

Peter Brigham
Director
Rosemont

13.10pm **Lunch**

14.00pm **Presentation**

Asia – emerging market?

Ralph Geiger
Director, Fixed Income Specialist
Credit Suisse Asset Management

- Asia has developed into an area of robust fundamentals and continues to deliver steady growth
- Corporate fundamentals and positive credit trend in Asia look attractive compared with European and US counterparts
- The Asian fixed-income asset class is steadily growing, with markets expanding and the local investor base growing

14.20pm **WealthTalk**

Implications of the further opening of China A-Shares to the global investment community

- What does this mean for European investors?
- What is the best way to access China?

Marc Haede
Executive Director, Index Client Coverage
MSCI

14.35pm **WealthTalk**

The Indian opportunity

- Where has India moved from and where is it going?
- What are the key drivers and challenges to the India growth story?
- How to access the Indian opportunity?

Evan Gallagher
Chief Executive Officer
ASK Capital Management

14.50pm **WealthTalk**

Finding new investment horizons

- How to participate in the ‘Belt and Road’ theme
- Where are the investment opportunities?
- What should you know about this story?

Johnson Chng
Founding Partner
Silk Road Finance

15.05pm **Refreshment & Networking**

15.35pm **WealthTalk**

15.50pm **WealthTalk**

Volatility as a diversifier in an Asian Portfolio

Rene Muller
Founder and CEO
ecamos Capital

16.05pm **Panel discussion**

Are you ready to make the most of the Asian investment story?

- How should you assess the different markets, products and assets in Asia?
- What role should Asia now play in investment portfolios?
- What's the difference between Asia and other emerging markets?
- Should you and your clients be investing more in Asian fixed income and credit? How do you do this?
- How do you access opportunities in local markets – especially India and China?
- Where should we be looking in private debt and other interesting alternative assets?
- Does liquidity matter to Asian clients?
- How do you need to refresh or reinvent your investment platform to make it relevant to Asian clients?
- What do people NOT tell you about investing in Asia? How can you save time and effort by helping clients to avoid making the wrong decisions?
- What's the best advice you can give your clients around investing in Asia? Should they invest more in the region?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Sameer Dev
Managing Director
ASK Capital Management

Ralph Geiger
Director, Fixed Income Specialist
Credit Suisse Asset Management

Johnson Chng
Founding Partner
Silk Road Finance

17.00pm **Forum End**

Workshops