

# Asian Wealth Management Forum 2017

8.40am Registration

9.00am Welcome Address

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

9.05am Panel Discussion

How can we really deliver value to our clients?

- What do clients actually want from their wealth manager today?
- Who is best-placed to deliver on client expectations?
- How do we know what adds value?
- What are the sustainable ways to generate profit?
- Do we need to rethink the business model?
- International versus local players - who's making progress, and who isn't?
- Is the extent of regulatory reform now at a tipping point?

Chair

Michael Stanhope  
Chief Executive Officer & Founder  
Hubbis

Panel members

Vincent Chui  
Managing Director, Head of Asia Institutional Equity Distribution & Private Wealth  
Management  
Morgan Stanley

Malik Sarwar  
Global Head of Sales Management, Group Wealth Management  
HSBC

Anthonia Hui  
Chief Executive Officer  
AL Wealth Partners

Thomas Young  
Head of High Net Worth Business  
Generali

Tuck Meng Yee  
Partner  
JRT Partners

Debby Davidson  
Group Business Development Director, Asia  
Equiom Group

Speaker

9.50am

Head - to - Head Q & A

Alternative assets in Asia

Karen O'Hanlon  
Managing Director  
First Names Group

- In 2017 what do you see being the top advantages / opportunities of planning with alternative assets?
- Alternative assets continue to gain importance in Asia, what are the latest trends you have witnessed?
- What are clients' largest fears of structuring alternative assets; how do they overcome this?
- What is one of the industry's biggest misconceptions around alternative assets?
- Can the client still enjoy the use of alternative assets that are placed in a trust?

10.00am

Presentation  
Singapore and Hong Kong - Asian wealth management centres

Dr Angelo Venardos TEP, IBF Fellow  
Managing Director  
Equiom Group

- Assessing the merits and pitfalls of different jurisdictions
- How to decide what's best for your clients

10.10am

Panel Discussion

Industry debate: Boutique Wealth Managers vs Big Private Banks. Who is best?

- Are big private banks the only option given the cost of doing business?
- Or are boutique, focused and independent wealth managers the best option for clients?
- Is more consolidation a good thing?
- Should scale be the priority to succeed?
- What will the landscape look like in 5 years' time?

Chair

Michael Stanhope  
Chief Executive Officer & Founder  
Hubbis

Panel members

Bassam Salem  
Chief Executive Officer Asia Pacific  
Citi Private Bank

Francois Monnet  
Managing Director, Head of Private Banking Greater China  
Credit Suisse Private Banking

Antoine Candiotti  
Chief Executive - Hong Kong Branch  
Indosuez Wealth Management

Jessica Cutrera  
Managing Director  
The Capital Company

Riccardo Lehmann  
Managing Director  
Swiss Asia

Rohit Bhuta  
Chief Executive Officer  
Crossinvest

Speaker

10.55am Refreshment & Networking

11.25am Presentation  
Can Asia overcome the Trump headwind?

Joshua Crabb  
Head of Asian Equities, Asian Equities Team  
Old Mutual Global Investors

- Nearly two months into 2017, there remain a number of uncertainties for Asian investors, not least US-China relations under a Trump presidency
- Despite this, our feeling is that Asian equities remain cheap relative to history, while corporate earnings are on an improving trend. But with Asian shares still under-owned what will it take to convince investors?
- What's the case for active management of portfolios?
- Why be optimistic for Asian equities?

11.35am Presentation  
Digital wealth management: embracing the new normal

John Robson  
Chief Commercial Officer  
Quantifeed

Where robo-advice is today and where it's going tomorrow:

- How digital platforms are changing the investing experience for advisers and their clients
- Today's investor mind-set: a focus on goals rather than outperformance
- Stronger together: a halt to the man vs. machine debate
- Trending: mass customisation in automated investment portfolios
- AI & data: the future of customer experience

11.45am Presentation  
HNWI and UHNWI clients - how a Variable Life Insurance can address their needs

Steve Hickman  
Chief Executive Officer, Singapore  
Swiss Life

- Diversification/choice in insurance solutions for HNWI clients

- VUL value proposition to HNW clients and private banks
- Understanding why some HNW clients have avoided life insurance as a planning solution
- What does VUL bring to the market that currently is not available

11.55am

Head - to - Head Q & A

Overview of private clients' residence and citizenship planning

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

- What are some of the trends in terms of clients in North Asia seeking migration planning?
- How Henley & Partners sees the current changes affecting the residence and citizenship planning of private clients in North Asia
- How Henley & Partners advises private clients when they consider obtaining an alternative residence or citizenship
- How Henley & Partners helps private clients during their residence and citizenship planning

12.05pm

Panel Discussion

The internationalisation of Chinese wealth - how can you capitalise on this opportunity?

- How do we help Chinese HNW / UHNW clients diversify, protect and pass on their wealth?
- How can you build up your client book without going to jail?
- How can you participate in the generation wealth transfer opportunity?
- What are the potential structures and solutions that work best today?
- How do you find, access and retain these clients, especially the next generation?
- What's the right advice given regulatory and tax complexities such as CRS?

Chair

Michael Stanhope  
Chief Executive Officer & Founder  
Hubbis

Panel members

Lennard Yong  
Regional Chief Executive Officer, Asia  
FTLife Insurance

Michael Olesnick  
Partner, Senior Advisor  
KPMG

Kevin Lee  
Partner  
Zhong Lun Law Firm

Nigel Rivers  
Founder and Chief Executive Officer  
Capital Solutions

William Probert

Senior Consultant  
Sovereign Trust

Speaker

12.50pm

Lunch & Networking

1.40pm

Panel Discussion

China: is the golden goose dead? Where next for insurance companies in Hong Kong?

- Is the disruption in business from China a short-term or long-term problem for insurance companies?
- What are priorities for developing your Hong Kong business?
- What's the opportunity that the development of wealth management means for you?
- What's the right product and proposition?
- Can we develop a business proposition as well as tools which are right for the needs and demands of the next generation?

Chair

Michael Stanhope  
Chief Executive Officer & Founder  
Hubbis

Panel members

Ben Worthington  
Head of Life Business, Hong Kong  
Zurich Life Insurance

William Lee  
Associate Partner  
Synpulse

Donald Soo  
Chief Executive Officer  
Orb Global Wealth Management

Speaker

2.20pm

Presentation

Shifting the wealth management model to fee-based solutions from transaction-based sales

Anthony J. Harper  
Chief Executive Officer and Co-Founder  
Managed Accounts Partners Limited

- How will revenues be generated from assets if mutual funds no longer have retrocessions?
- Likely implications of the recent SFC proposals to require intermediary disclosures on independence, and enhanced fee transparency
- How important is customising client portfolios and providing them look-thru transparency in their holdings?
- Where are discretionary portfolio management penetration ratios today and where are they headed?

2.30pm

## Presentation

Why risk-focused investing is a better way to build a portfolio

Harold Y. Kim, Ph.D.

Founder and Chief Executive Officer

Neo Risk Investment Advisors

- Blind-spots in giving portfolio advice – why do most advisers only focus on returns?
- You can't control performance, but you can control risk
- How a focus on dynamically managing risk can greatly improve returns

2.45pm

## Refreshment & Networking

3.15pm

## Panel Discussion

How will we change the mind-set of clients - and focus on long-term goals and portfolio construction?

- How can we develop the advisory proposition and make more money out of it?
- Can the regulatory environment be our friend in driving greater transparency?
- What will be the impact of a new regulatory regime that moves us away from commissions and towards fee-based models?
- Will clients embrace this approach?
- How do we get more of a client's total wealth?
- Investors hold a mutual fund for 4 years on average in the US, but only a few months in Asia. Will this ever change? Does anyone really want it to?
- What's the process to improve performance?
- How do we make portfolio construction core to the offering?
- Are all the easy wins done with - now the leveraged bond game and others have come to an end?

## Chair

Michael Stanhope

Chief Executive Officer & Founder

Hubbis

## Panel members

Adam Cowperthwaite

Head of Equities - Asia Pacific

Citi Private Bank

Angel Wu

Regional Head of Products & Solutions, Asia & Middle East

ABN AMRO Private Banking

Sen Sui

Head of Wealth Management, Asia

Indosuez Wealth Management

Pius Zraggen

Partner, Chief Executive Officer

OLZ & Partners

Claudius Tsang, CFA

Partner and Co-Head of Private Equity, North Asia

Templeton Asset Management

Leon Mirochnik, CFA  
Head of Business Development  
Enhanced Investment Products

Speaker

4.00pm

Panel Discussion

How can you deliver investment performance and avoid risk in 2017?

- 2017 is supposed to be an equities year – will it actually happen?
- Will this be another year of turbulent markets? A replay of 2016?
- How will investors generate performance in 2017?
- How do clients think today? And how do you manage their expectations?
- What are the biggest risks for 2017?
- How will geo-political risks impact the landscape?

Chair

Michael Stanhope  
Chief Executive Officer & Founder  
Hubbis

Panel members

Ronald Lee  
Managing Director, Head of Private Wealth Management, Asia Pacific  
Goldman Sachs

Alan Luk  
Head of Private Banking & Trust Services  
Hang Seng Bank

John Haynes  
Head of Research  
Investec Wealth & Investment

Arjan De Boer  
Head of Markets and Investment Solutions, Asia  
Indosuez Wealth Management

Stephen Kam  
Senior Product Specialist, Asian Equities  
HSBC Global Asset Management

Adeline Tan  
Head of Investment Advisory, Hong Kong  
Mercer

Speaker

5.00pm

Forum Ends