

# INDONESIA WEALTH MANAGEMENT FORUM - 2024

8.30am Registration

8.55am Welcome Address

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

9.00am Panel Discussion

Trends, Opportunities and Challenges for the industry

- What are the trends we are seeing in 2024?
- What are your priorities for the year ahead?
- Have there been any regulatory changes impacting business and client relationships?
- What strategies can wealth managers employ to increase their market penetration and reach more potential clients?
- How can wealth managers in Indonesia differentiate themselves?
- What are the evolving expectations of clients from wealth managers in Indonesia, and how can you meet these demands?
- What role can wealth managers play in promoting financial education and inclusion in Indonesia?
- Finding, retaining and training talent. Is this still the biggest challenge?

Chair

Andrew Hendry  
CEO Asia  
Janus Henderson Investors

Speaker

Yulius Ardi  
Head Of Wealth Management  
Bank Danamon

Samdarshi Sumit  
President Director & CEO  
PFI Mega Life Insurance

Scott Moore, IMCM  
Managing Director  
Henley & Partners

9.30am Presentation  
2nd Passport; Investment Opportunity – Insurance Policy – Asset Class

Ian Horsburgh  
Country Head of Indonesia  
Henley & Partners

- Breakdown barriers to entry
- “a thing providing protection against a possible eventuality”
- The new asset class

9.45am

## Panel Discussion

Evolving the platform and proposition. Improving the client experience

- Where are you on your digital journey?
- In what ways can we utilise technology to enhance client service, operational efficiency, and innovate our product offerings?
- How can we tailor our services and communications to better meet the individual needs of our clients?
- What are the best Client-Centric Approaches? Success Stories and Case Studies - Digital Transformation Strategies
- Artificial Intelligence or Emotional Intelligence – which is more important? How will AI influence the business in the future?
- What's the priority? How are you allocating your resources? Enhanced Customer Experience, Data Analytics, Automation, and Fintech Partnerships?
- What opportunities does digital banking present for wealth managers in Indonesia to expand their client base?

Chair

Darell Miller  
Managing Director APAC  
Wealth Dynamix

Speaker

Christine Tan  
Head of Wealth Management Product  
Bank Danamon

Mark Buesser  
Chairman  
IMTF

Sigit Prihatmoko  
Vice President Corporate Innovation Centre  
Bank Negara

10.15am

## Presentation

Millennials: Reshaping the Future of Wealth Management in Asia

Endang Werang  
Business Development Manager  
Comarch

- Fun fact about Millennials
- New way of getting the message heard
- Attract, onboard, engage, retain – getting things done in the right way

10.30am

## Panel Discussion

Wealth planning and structuring – understanding the needs of our clients

- How are wealth and asset management firms assisting HNW clients with wealth transfer and succession planning?
- What are the tools we can use to help?

- What's the role of HNW Insurance?
- What are the challenges faced by UHNW Families today?
- What is the importance of addressing family dynamics and governance structures within UHNW families to ensure long-term wealth preservation?
- Specifically – what are the opportunities and challenges of international wealth structuring and diversification for UHNW families?
- Share real-life case studies and success stories of UHNW families who have effectively structured their wealth.
- The challenges of the next generation. How can you optimize the transition of wealth?

Chair

Zac Lucas  
Partner – International Private Wealth  
Spencer West LLP

Speaker

Asthika Dhamasatya  
Bancassurance Product and Marketing Head  
Bank Danamon

Woon Hum Tan  
Partner, Head of Trust, Asset & Wealth Management Practice  
Shook Lin & Bok

Dr Irina M Francken  
Director  
IN Fiduciary Services

Jonathan Hekster  
Country Advisor  
FWD

Sharon Yam  
Country Head, Ocorian Singapore, Head of Private Clients  
Ocorian

11.00am Refreshment & Networking

11.30am Presentation  
How IMTF Siron One can digitize your CLM/Compliance technology and drive business growth

Mark Buesser  
Chairman  
IMTF

- Dynamic KYC triggering >> Reduction in KYC review friction and increased efficiency.
- Modern CLM platform >> Accelerating size and speed of onboarding.
- Real-time AML / 360 >> Comprehensive data at the fingertips of the front office.

11.45am Presentation  
Scaling Without Pain – Can You Have Your Cake and Eat It Too?

Darell Miller  
Managing Director APAC

## Wealth Dynamix

- Why breaking the chain between revenue and costs is crucial for Wealth Managers and Private Banks that want to scale profitability
- Why does this matter now?
- How do you break the chain and enable relationship managers to better serve their clients?
- Scale, eat, repeat!

12.00pm

## Panel Discussion

HNW clients in Indonesia and their interactions with wealth and asset management firms in 2024

- What are the major economic trends currently influencing the investment decisions of HNW clients in Indonesia?
- How are regulatory changes in Indonesia affecting the investment strategies of HNW clients?
- In what ways is technology shaping the investment services provided to HNW clients in Indonesia?
- How significant is the impact of ESG (Environmental, Social, and Governance) factors on the investment portfolios of HNW clients in Indonesia?
- What are the key expectations of HNW clients from their wealth and asset management firms in 2024?
- What are the primary concerns regarding risk management for HNW clients in Indonesia, and how are firms addressing these concerns?
- How important is the personalization of investment solutions and services for HNW clients in Indonesia?
- What new investment products and services are emerging that cater to the evolving needs of HNW clients?

## Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

## Speaker

Guntur Putra  
President Director, CEO  
Pinnacle Investments

Antony Dirga  
President Director  
Trimegah Asset Management

Ivan Kusuma  
Head of Investment & Insurance  
DANA

12.30pm

## Head - to - Head Q & A

Amelia Tansil  
Business Development Manager  
Comarch

- How are wealth managers in Indonesia enhancing their digital capabilities?
- What are some of the trends we are likely to see in 2024?
- How does Comarch help with the process of digital transformation?

12.45pm

Presentation

Empowering Growth: The Role of Training and Professional Development in Wealth Management

Michael Stanhope

Founder & Chief Executive Officer

Hubbis

- How critical is ongoing training and professional development for wealth managers in Indonesia?
- What are the current trends in training programs for wealth management professionals in 2024?
- How does Hubbis support and facilitate continuous learning and professional growth?

1.00pm

Lunch & Networking

2.00pm

Forum Ends