

Middle East 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 take the wealth management industry forward in the Middle East?

- The Middle East is full of potential for wealth management – what are the biggest opportunities and how can we make the most of them?
- What changes are we seeing in terms of where wealth comes from?
- Which are the different business models and platforms suited to this market?
- How does this compare with the landscape in Asia?
- Are there any lessons from how Singapore has developed its wealth management proposition?
- How do you make sense of multiple regulators and foster more collaboration between all stakeholders?
- How can we better educate and provide more meaningful offerings for clients – especially the next generation
- Where will wealth come from in the next 5 years – and how can we get prepared for it?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Rajesh Malkani
Head Private Banking & Wealth Management
Mashreq Bank

Gautam Duggal
Managing Director, Regional Head of Wealth Management, AME, Europe & Head of Wealth Management UAE
Standard Chartered Bank

Daffer Luqman
Executive Vice President
Abu Dhabi Islamic Bank

Cedric Lizin
Managing Director, Head of Wealth Management, Middle East, Africa & Japan
Barclays

Jamal Al Kishi
Chief Executive Officer, Middle East & Africa
Deutsche Bank

Angelo Venardos

Chief Executive Officer
Heritage Trust Group

Speaker

9.55am

Presentation
Building family legacy through citizenship and residence programmes

Marco Gantenbein
Managing Partner
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

10.05am

Panel Discussion

How can you develop your advisory proposition and the quality of the client engagement?

- How can you deliver a relevant, advisory-led, outcome-based approach for your clients?
- How can we align the interests of clients and advisers, and move away from driving business via commissions?
- How is the new regulatory environment developing – and what is the likely impact of the SCA's recent revamping of the regulations around UAE [mutual funds](#) distribution?
- In-house vs outsourced. What's the right balance?
- What's the way forward for how product manufacturers and fund selectors should partner with each other going forward?
- Developing more Shariah-compliant products – what are the challenges and opportunities? How do you create geographical and other diversity?

Chair

Michael Stanhope
Chief Executive Officer & Founder
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Panel members

Appul Jaisinghani
Head of [Investment Funds](#)
Emirates NBD

Shiraz Habib
Executive Director, Head of Investment Products & Solutions
National Bank of Abu Dhabi

Deepak Ahuja
Director, Wealth Management, Bancassurance & Mortgages
RAKBANK

Gifford Nakajima
Head of Wealth Development - UAE and MENA
HSBC Bank

Speaker

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| 10.45am | Refreshment & Networking |
| 11.15am | <p>Presentation The case for gold</p> <p>Jeffrey Rhodes Director Global Precious Metals</p> <ul style="list-style-type: none"> • Investing in gold • The role of gold in portfolios |
| 11.25am | <p>Presentation A case for hybrid securities</p> <p>Matthew R Byer Executive Director and Chief Operating Officer Spectrum Asset Management</p> <ul style="list-style-type: none"> • What are preferred securities? • Opportunities in preferred securities • How big an impact is regulation having on preferred securities? • How important is security structure and quality? • How did preferred securities perform in 2016? • Why should investors consider allocating to preferred securities? |
| 11.35am | <p>Presentation Are we ready for the 'CRS typhoon'?</p> <p>Vikrant Pangam Managing Director Amicorp Group</p> <ul style="list-style-type: none"> • Anticipating the wave of CRS, exposures, implications and preparation • What and who will be reported under CRS? • Compliance obligations by banks, funds, service providers • Implications for HNWIs |
| 11.45am | <p>Presentation Digital delivery of wealth management - the era of the platform?</p> <p>Damian Hitchen Chief Executive Officer, Middle East & Asia Swissquote</p> <ul style="list-style-type: none"> • Transition of wealth management into the digital era • Distribution / connectivity is key |

11.55am

Presentation
Wealth management for the digital age customer

Abhra Roy
Lead Product Line Manager, Finacle Wealth Management
Infosys Finacle

- With rapidly-changing customer needs and unassailable digitisation, the wealth management industry needs to evolve towards a truly customer centric, technology-based and service-driven value proposition
- This presentation explores the agents of change and the transformations in the financial services and wealth management spaces for the digital age customer

12.05pm

Panel Discussion

Are we ripe for disruption?

- What's the role of digital today in wealth management in the Middle East?
- What impact will technology have – now and in the future?
- What systems, solutions and other tools are making a difference in the client experience?
- Do we have adequate tools to engage customers?
- Will we see robo-advisers and fintechs transform the industry?
- How far do platforms and propositions need to evolve and digitise?

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Michael Stanhope
Chief Executive Officer & Founder
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Panel members

Anthony Jaganathan
Head of Operations & Middle Office, Wealth Management
Emirates NBD

Damian Hitchen
Chief Executive Officer, Middle East & Asia
[Swissquote](#)

Milind Kulkarni
Chief Executive Officer and Managing Director
FinIQ

Kostas Kotsiopoulos
Global Sales Director
Profile Software

Chandrima Das
Chief Executive Officer & Co-founder
Bento

Speaker

12.45pm

Lunch & Networking

1.35pm

Panel Discussion

Evolving the IFA proposition – what's the real potential in the Middle East?

- How will the value proposition for IFAs continue to change?
- Do you need to reinvent your business model?
- How far do you need to embrace technology to drive growth and efficiency?
- Should growing AUM still be the biggest priority?
- How will IFAs thrive in a new, transparent world?
- How can you be more effective in dealing with clients' [investment](#) needs?
- To what extent do we need to clarify who does what and how they are licensed?

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Michael Stanhope
Chief Executive Officer & Founder
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Panel members

Timothy Searle
Chairman
Globaleye

Sean Kelleher
Chief Executive Officer
Mondial

Chris Ferguson
Chief Executive Officer
Credence

Speaker

2.10pm

Presentation
Singapore and Hong Kong - Asian wealth management centres

Angelo Venardos
Chief Executive Officer
Heritage Trust Group

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

2.20pm

Presentation
Using life insurance to improve customer outcomes

Philip Cernik
Chief Marketing Officer
Friends Provident International

- The benefits of life insurance are significant not just in terms of protection against the risk of illness or death but also in terms of wealth management and estate planning for savers and [investors](#)
- Philip will explore how advisers can utilise insurance to improve the outcomes for both new and existing expatriate customers in a market where regulation is forcing significant change

2.30pm

Panel Discussion

What's the opportunity for insurance companies to thrive as wealth management develops?

- Where are the biggest opportunities and challenges for insurance companies in the Middle East wealth management market?
- How do you reach the number of people across the GCC in a sustainable way?
- How can we evolve the proposition?
- What role will bancassurance and other distribution channels play going forward?
- What's the role of the regulator?
- What's the opportunity for the development in Shariah-compliant solutions?
- Where will disruption come from?

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Michael Stanhope
Chief Executive Officer & Founder
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Panel members

Sivadeet Baruah
Head of Individual Life
Oman Insurance

Walter Jopp
Chief Executive Officer, Middle East
Zurich International Life

Philip Cernik
Chief Marketing Officer
Friends Provident International

Rajesh Sethi
Chief Executive Officer
Noor Takaful

Speaker

3.00pm

Refreshment & Networking

3.30pm

Panel Discussion

Are you making the most of the family wealth opportunity in the Middle East?

- How have you structured your organisation to meet the needs of families and family businesses in the Middle East?
- What are the challenges these clients have?
- What's the likely impact of new international tax compliance measures for anyone holding money in the UAE as of January 2017?
- How can you help business-owning families move from the core business to asset management to diversification?
- To what extent does your service offering and product proposition need to evolve? What can you really do within the GCC?
- Succession planning – how can you help your clients transition from one generation to the next?
- Offshore versus local structures – what are the options, and for whom?
- What is the right approach to winning business from the next generation?

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Panel members

Michael Chahine
Founder and Chief Executive Officer
Nexgen Desert Green Consultancy

Karim Ghandour
Founder & Chief Executive Officer
LegacyLine Family Office

Shainav Gupta
Director, Institutional Sales
Amicorp Group

Stijn Janssen
Head of Tax, Middle East
Withers

Yann Mrazek
Managing Partner
M/Advocates of Law

Fiona McClafferty
Senior Manager, Deloitte Private
Deloitte LLP

Speaker

4.15pm

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 is the Middle East reacting to and participating in the markets globally?
- How is the diversification of the Middle East economy coming along? Where is greater emphasis needed?
- What's the role for alternatives? And commodities like gold?
- Is there an increasing role for managed investments?
- 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](#)

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Panel members

Gary Dugan
Chief [Investment](#) Officer
Emirates NBD

Oliver Kettlewell
Portfolio Manager

Mashreq Bank

Deepak Mehra
Head of Asset Management, General Management
Commercial Bank of Dubai

Mohieddine Kronfol
Chief [Investment](#) Officer, Global Sukuk and MENA Fixed Income
Franklin Templeton Investments

Gerhard Schubert
Founder
Schubert Commodities Consultancy

Speaker

5.15pm

Forum Ends