

# Philippines Wealth Management Forum 2018

8.40am Registration

9.00am Welcome Address

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

9.05am Panel Discussion

Wealth management offering in Philippines - biggest priorities in 2018?

- How do the different players – wealth management, insurance and banks compete or complement each other?
- Asset management companies – what can we do to accelerate the business?
- How important is digital today?
- Offshore / onshore. Where is the long-term opportunity?
- Who is making a commitment to building an onshore business and why?
- Will we see an increased presence from offshore private banks in the Philippines?
- How will it effect and influence domestic Private banks?
- Is there a hybrid model where international banks can work with onshore banks?
- What changes are we seeing in client expectations and behaviour?
- Where will the continued growth come from and what are your priorities?
- How is regional wealth management developing?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Christian Senn  
Managing Director, Market Group Philippines Market  
Credit Suisse Wealth Management

Stella Cabalatungan  
Executive Vice President  
BDO Private Bank

Michael Ferrer  
Managing Director  
ATRAM

Vincent Magnenat  
Limited Partner, Global Head of Strategic Alliances, Asia Regional Head  
Lombard Odier

Michael Oliver Manuel  
Chief Market Development Officer  
Sun Life Financial

9.55am Head - to - Head Q & A

## Recent Trends and Developments in Investor Migration

Dominic Volek

Group Head of Private Clients and Member of the Executive Committee

Henley & Partners

- Global trends and developments in investor migration
- What's driving investor migration for Asian HNWIs?
- Key considerations for HNWIs in relation to residence and citizenship planning

10.05am

Presentation

Digital Wealth Management

Dhawal Kamath

Country Chief Executive Officer, Philippines, Head of Products SEA

EbixCash Financial Technology

10.15am

Panel Discussion

TECH / DIGITAL = Faster, cheaper and better wealth management

- How are you making your business more efficient and streamlined?
- Is building digital distribution important? Will all the bank branches disappear?
- Build it yourself or PLUG & PLAY?
- What digital trends are we seeing elsewhere?
- Which technology solution provider do I choose?
- What are the consequences of not doing enough or anything?
- What is the client experience supposed to look like?

Chair

Michael Stanhope

Founder & Chief Executive Officer

Hubbis

Speaker

Xavier Burkhardt

Executive Director

Leonteq

Anthony J. Harper

Chief Executive Officer and Co-Founder

Axial Partners

Thomas Tse

Senior Sales, North Asia

Welinvest

Adrian Williamson

Director - Asia

ERI

Dhawal Kamath

Country Chief Executive Officer, Philippines, Head of Products SEA

EbixCash Financial Technology

11.00am

Presentation

## Current Wealth Management Trends

Irene Lee

Business Development Director, Intermediary and Partnership  
Hawksford

- Overview - Asia in General; [GDP and Growth](#)
- Updates on Singapore and Hong Kong as Wealth Management Centres
- Brief Updates on CRS and AEOI -
- Tax Compliant Estate Planning Tools

11.10am

Refreshment & Networking

11.35am

Presentation

A new look at Universal Life - Guaranteed returns and Liquidity in a volatile world

David Varley

Chief Partnership Officer - Brokerage, International HuBS  
Sun Life

- Using Insurance as an Asset to reduce risk to your portfolio
- Take advantage of the Wealth Structuring benefits of HNW Insurance
- Learn about how High and Low Life cover Universal Life solutions to give you guaranteed returns and liquidity

11.50am

Presentation

How to protect your wealth with gold

Joshua Rotbart

Managing Partner  
J. Rotbart & Co.

- What do I buy?
- How do I buy it?
- Where do I store it?
- What are the risks to avoid?
- How can I make money out of this opportunity?

12.05pm

Presentation

How to use Structured Investment Solutions in a changing market

Xavier Burkhardt

Executive Director  
Leonteq

- A suitable solution for each market conditions
- Benefit from market volatility
- A great diversification tool

12.15pm

Panel Discussion

## Panel discussion Evolving the wealth management proposition in the Philippines – Helping Wealthy Families

- Is there a move towards 'advice' in the Philippines? What does this mean?
- Delivering advice – who needs it and who will pay for it?
- What's the potential impact of CRS / Automatic Exchange of Information on you and your clients?
- When will the amnesty programme be implemented?
- How can local private banks become more competitive in the global private banking universe e.g. laws / regulations, booking vehicles, platforms, access etc?
- How are you preparing for the next generation?
- Estate and Succession Planning – how can you make the most of this opportunity?
- What are some of the global and regional trends in wealth structuring and wealth planning?
- What's the role of Insurance?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Angie L. Pacis  
Founder, President  
KnowledgeLinks Wealth Solutions

Irene Lee  
Business Development Director, Intermediary and Partnership  
Hawksford

David Varley  
Chief Partnership Officer - Brokerage, International HuBS  
Sun Life

Sebastien Hayoz  
Managing Director  
Asiaciti Trust

Gez Owen  
General Counsel and Head of Content  
Hubbis

12.50pm

Presentation  
Is transparency the new norm?

Sebastien Hayoz  
Managing Director  
Asiaciti Trust

- An overview on the existing and recent regulations in terms of transparency

1.00pm

Lunch & Networking

1.50pm

Presentation  
The World's Leading Residence and Citizenship-by-Investment Programs

Scott Moore, IMCM  
Managing Director  
Henley & Partners

- Overview of Immigration programmes
- The leading Citizenship-by-Investment Programs in the Caribbean
- European Citizenship-by-Investment in Malta and Cyprus
- Attractive European Residence-by-Investment Program

2.30pm

Presentation  
Managed Accounts in Asia

Anthony J. Harper  
Chief Executive Officer and Co-Founder  
Axial Partners

Managed accounts are one of the largest and fastest growing segments of the wealth management market globally, eclipsing \$5 trillion of assets in the U.S. market alone. Increasingly they are available in Asia as an important tool for wealth managers to access third party asset managers to implement tailored and transparent solutions for their discretionary portfolio management clients.

- What is a managed account?
- How does it work?
- Making money for clients with managed accounts
- Why is a managed account relevant in Asia today?
- Who is Axial Partners?

3.10pm

Refreshment & Networking

3.30pm

Panel Discussion

Selling Funds - time to rebuild the engine and add a turbocharger?

- Slow growth in fund distribution to retail – time to rebuild the engine and add a turbocharger?
- Three regulators for funds – time for more consistency and simplification?
- We love to talk about client education – but is there any evidence this is happening with focus and conviction? How will we improve the financial literacy of the Filipino investing public?
- Is the regulatory regime under which wealth or asset managers in the Philippines operates in need of an urgent upgrade?
- Will the unit-linked business continue to grow fastest?
- Is there a move towards advice? Discretionary?
- How are you thinking about fund selection and portfolio construction?
- Open architecture – myth or reality?
- What are the product strategies of the future?
- Fintech and distribution – will it evolve in a meaningful way?
- Product platforms – are you ready?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Juan Sabino P. Lizares  
Senior Vice President - Wealth Management Group  
BDO Private Bank

Michael Gerard D. Enriquez  
President and CIO  
Sun Life Investment Management and Trust Corporation

Caroline Tinio  
Vice President, Head of Partnership Distribution  
Philam Asset Management

Carlos Jalandoni  
Vice President, Head of Credit & Research  
BPI Asset Management & Trust

Deanno Basas  
CEO of Digital  
ATRAM

4.15pm

Forum Ends