

Asian Wealth Management Forum 2018

8.30am Registration

8.50am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

8.55am Presentation
Women and Wealth – Why it matters and what can private banks do?

Hanna Raftell
CEO
Fimento

- Why focus on women's wealth?
- Are women investors any different from their male counterpart?
- Why upskilling and retraining are necessary and why focus on soft skills?

9.05am Panel Discussion

The What and How of differentiated WM 2.0

- Has anything really changed in this industry over the last ten years?
- Has the WM industry truly become client centric or are wealth managers still just sales focused?
- How have you changed your business model to be client centric? How has frontline comp changed to align to client interests?
- What tangible digital progress has been made and what's your client feedback?
- What is the biggest scope of disruption? Who will benefit most: big banks, FinTech's or BigTechs?
- What next: AI, big data and its impact?
- Impact of key business mega-trends of passive investments, fees, transparency, regulations; How are you adapting to grow?
- Opportunities of key market mega-trends of millennial, baby boomers, women empowerment, ESG, SRI. How are you capitalising on these?

Chair

Malik S. Sarwar
CEO
K2 Leaders

Speaker

Kees Stoute
Regional Private Banking Chief Operating Officer
EFG International

Alan Luk
CEO & CIO
Winner Zone Asset Management

Vincent Chui
Head of Wealth Management, Asia Pacific & Chief Executive
Morgan Stanley

Simon Lints
Chief Executive Officer, Singapore
Schroders Wealth Management

Sung June Hwang
Managing Director, Head of APAC Products & Solutions
Credit Suisse Wealth Management

Michael Benz
Senior Advisor
Synpulse

Peter Stein
CEO and Managing Director
Private Wealth Management Association

9.55am

Presentation
Residence and citizenship planning for Asian families - an overview

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

- Why do families relocate?
- What should clients consider when carrying out residence and citizenship planning?
- Current developments in residence and citizenship programs

10.05am

Presentation
Tech Stocks: boom or bubble?

Andy Budden
Investment Director
Capital Group

- Market volatility is back – but where's all the volatility in tech stocks?
- Fundamentals matter: Facts to know about tech and why this boom is no dot-com bubble
- More than tech: The companies of knowledge economy have become global leaders

10.15am

Panel Discussion

What's the role that Hong Kong will play in the future access to China's wealth?

- Is the outflow of capital from HNWI in China slowing down?
- What types of investment are Mainland HNWI interested in?
- Doesn't Stock Connect and the forthcoming ETF Connect mean less opportunity for advisers?
- What's the opportunity for Hong Kong-based banks to make the most of the growing Chinese wealth? onshore and offshore?
- Can Hong Kong banks compete with Chinese players? Do they need to?
- How are the different business models evolving in the onshore wealth management market?

- What are the services that a Chinese private bank offers? As client's demand diversification - How are they growing their platform in Hong Kong?
- What can the global banking industry learn from Chinese financial services digital innovation?
- What do clients want from their off-shore private banking partners? Can private banks and wealth managers successfully or compliantly deal with wealthy Chinese clients?
- Do Chinese clients have unique expectations around technology, products and service?
- Do Chinese clients really care more about services like family office set-up, insurance, citizenship and education? Are there any real family offices in China? What do they do? What are their needs?

Chair

Malik S. Sarwar
CEO
K2 Leaders

Speaker

Jonathan Larsen
Chief Innovation Officer, Ping An Group Chairman and CEO , Ping An Global Voyager Fund
Ping An Group

Kevin Huang
Deputy Head of Global Private Banking
China Merchants Private Bank

Jennifer Zeng
Partner, Head of Financial Service, Greater China
Bain & Company

Janet Li
Asia Wealth Business Leader
Mercer

Monica Lee
Partner / President
Triumph Capital International

Stewart Aldcroft

Langley Castle Consulting

11.00am

Presentation
How regulation is transforming ETF trading across regions

Antoine de Saint Vaulry
Director, Head of ETF & Flow Trading, Asia Pacific
Commerzbank

- ETFs : up, up and away !
- Changing regulations for banks and distributors favours the ETF market
- Different pictures across the globe

11.10am

Refreshment & Networking

11.35am

Presentation
Asia ex Japan – From emerging to leading

Ben Sheehan
Senior Product Specialist, Asian Equities
HSBC Global Asset Management

- China – building a firmer foundation for sustainable growth
- A strong earnings recovery and reasonable valuations bode well for a continued re-rating of Asia
- Dividends remain a key driver of long-term total shareholder returns in Asia
- Our key investment themes for 2018

11.45am

Presentation
Challenges arising from the UK Criminal Finances Act 2017

Gez Owen
General Counsel and Head of Content
Hubbis

- The new Corporate Offences of Tax Evasion
- The Statutory Defence of 'Reasonable Procedures'
- Unexplained Wealth Orders

11.55am

Presentation
Emergence of Asian Family Offices: the convergence of East and West Models

Philippe Legrand
Chief Executive Officer and Founder
LCA Solutions

From East to West:

- The basic issues of clients
- The differences of what they want to focus on
- How they each approach the changing external landscape and the concept of paying for advice
- The Focus in the East that needs to change
- A few action points for Asian Family Offices that are already well established in the West

12.05pm

Presentation
Exploring Significant Yield Opportunities in CoCos

Kylie Chan
Head of Sales, North Asia
Merian Global Investors

- Contingent Convertible Bonds (CoCos) - An established asset class offering an unique combination of high yields, high quality, low volatility, diversification and ample liquidity with issuance due to regulation and appetite constantly expanding
- Is this a good asset class for gaining yield under a low interest environment?

12.15pm

Panel Discussion

The Art and Science of Wealth Solutions

- What are the trends we are seeing in wealth solutions globally?
- The challenges for family succession
- What are the specific challenges that wealthy Chinese families face?
- How is the concept of wealth solutions developing in China?
- How can RMs have a proactive, sensible and sensitive conversation around wealth solutions with clients?
- What's the role of insurance?
- How will clients diversify their assets?
- How will clients approach their legacy planning?
- How can you participate in the increasing offshoring of Chinese wealth?
- How can local and offshore firms collaborate?
- Are confidentiality and asset protection the main reasons clients use a trust?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

John Wong
Partner, China Family Business and Private Client Services Leader
PwC

Kevin Lee
Partner
Zhong Lun Law Firm

Michael Olesnick
Partner, Special Advisor
KPMG

Howard Bilton
Chairman
The Sovereign Group

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

Patricia Woo
Partner
Squire Patton Boggs

1.00pm

Lunch & Networking

1.50pm

Room A – Workshop

Active vs passive or investing beyond this opposition. Dynamic reallocation thanks to ETFs and Structured Products

- The score at half-time
- A closer relationship than apparent
- A landscape blurred by innovation

Antoine de Saint Vaulry
Director, Head of ETF & Flow Trading, Asia Pacific
Commerzbank

Franck Fayard
Director, Head of Product Engineering, Asia
Commerzbank

1.51pm

Room B – Workshop

Leading Residence and Citizenship-By-Investment programmes

- Overview of Immigration programmes
- European Citizenship-by-Investment in Malta and Cyprus
- EB-5 is not the last solution to the US
- Thailand Elite – The exclusive residence programmes in Asia

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

2.30pm

Room A – Workshop

The world is still open for business

The face of global business is rapidly changing and investors are often confronted with decisions that require sophisticated analysis. Moreover, in an environment characterised by healthy underlying growth but relatively high valuations, it is important to stay proactive and prudent, while not forgetting downside protection.

- Global companies are scouring the world for customers – where a company does business can be more important than where it's located
- Technology has been a game changer and idea-driven companies are taking the lead
- Protecting on the downside has become ever more important – how can we improve resilience of portfolios?

Andy Budden
Investment Director
Capital Group

2.31pm

Room B – Workshop

Exploring Significant Yield Opportunities in CoCos

Contingent Convertible Bonds (CoCos) - An established asset class offering an unique combination of high yields, high quality, low volatility, diversification and ample liquidity with issuance due to regulation and appetite constantly expanding. Is this a good asset class for gaining yield under a low interest environment?

The strategy will focus on investing primarily in bonds issued by such institutions that are at the lower end of their capital structure and in particular on contingent capital bonds – also known as contingent convertible bonds ('CoCos').

Key characteristics of the strategy includes:

- High income with low volatility potential
- Structured and repeatable investment process
- The most liquid part of credit markets
- Diversification across breadth of highly rated financials
- Diversified income source, low correlation
- Regulator-friendly asset class, a growing market

Kylie Chan
Head of Sales, North Asia
Merian Global Investors

3.10pm Refreshment & Networking

3.30pm Panel Discussion

Product Gatekeepers; Are we really focused on helping our clients create long-term value?

- What are the main investment themes and the products that will be most relevant in 2018 - Top risks and how to alleviate them? Mega-trends and how to capitalise on them?
- Active vs passive: friends or foes?
- Socially responsible and impact investing: it seems to be a growing concern for clients, are wealth managers giving it the attention it deserves?
- How would you explain your investment process and philosophy - and to what extent is it mandatory that your advisors follow it?
- Discretionary vs advisory vs execution: how can clients benefit?
- Most Private Banks in 2017 gravitated to using the same big funds. Is it now time to pay more attention to Boutique / Specialist managers? Is it possible to do so when you need scale?
- Selling global income funds and leveraging them 4 times – is this still appropriate?
- MiFID II – to what extent will it force Private Banks in Asia to restructure their investment engine and operate in a more transparent way?
- What's the extent that DIGITAL platforms help create long-term value for clients?

Chair

Malik S. Sarwar
CEO
K2 Leaders

Speaker

Tariq Dennison
Wealth Manager, US-Asia
GFM Asset Management

Jaye Chiu
Senior Managing Director, Head of Investment
EFG International

Guy Uding
Chief Investment Officer and Co-Founder
Axial Partners

Adam Cowperthwaite
Head of Markets, Citi Global Wealth APAC
Citi Private Bank

Frank Henze
Practice Lead - Financial Services IT
Trimantium GrowthOps

Aman Dhingra
Head of Advisory, South Asia
UBP

Nick Pollard
Managing Director, Asia Pacific
CFA Institute

4.15pm Panel Discussion

Product Manufacturers; What products do you have that you feel would be most valuable to HNW / UHNW clients in 2018?

- Nearly everyone had a good year in 2017 – what are your best and worst predications for this year?
- What funds / investment products have you got that are specifically relevant to China-based private banks and wealth managers? What are your plans for growing this opportunity?
- What's your view on technology, margin pressure and regulatory reform?
- Multi asset, Income generation and liquid alternatives – what will be the main themes for 2018?
- What strategies will enable Chinese / Asian investors get higher returns, whilst been mindful of potential market challenges in 2018?
- Global equity markets have seen a strong run. Does it still have legs? Or are we reaching a terminal stage? Where do you now turn to drive long-term returns for a portfolio?
- What alternative investments are there for HNW and UHNW clients and why are they relevant?
- What's the increasing role of Physical Gold?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Michael Levin
Head of Asset Management, Asia Pacific
Credit Suisse Asset Management

Lincoln Chow
Director, Head of Sales, Hong Kong & Singapore, Financial Institutions Marketing
Commerzbank

Nicolas Mathier
CEO
Global Precious Metals

Tony Wong
Head of Intermediary Sales
CSOP Asset Management

Ashok Kothari
Manager
Horizon Partners

Sebastien Brown
Investment Specialist
BNY Mellon

5.00pm

Closing remarks

Malik S. Sarwar
CEO
K2 Leaders

5.10pm

Forum Ends

Hubbis events are –

FUN, CONSISTENT, RELEVANT, ENGAGING AND UNIQUE