Asian Wealth Solutions Forum 2017

8.40am Registration

9.00am Welcome Address

Michael Stanhope

Founder & Chief Executive Officer

Hubbis

9.05am Panel Discussion

As a private bank – can wealth planning be the differentiating factor for your business?

- What are some of changes you see in the industry and what are the challenges and opportunities they represent for you?
- Will the opportunity pass private banks by?
- What does the word 'advice' mean today and who is licenced and capable of providing it?
- Are banks providing the services clients want or just selling them the services they
 have to sell?
- What's the role and relevance of wealth solutions specialists within banks today?
- RMs don't tend to get paid to give wealth planning advice so how do you monetise the engagement?
- How have you structured your organisation to meet the needs of family businesses in Asia? What services and products do you need to offer?
- How will technology impact the engagement with clients? How can you embrace technology?
- How do you co-exist with professional services firms when bringing the right solution to your clients?
- Banks are trying to institutionalise their clients but is it possible to do that in this space?
- Should a bank pay a retainer to an independent provider who is qualified and licensed to have a wealth solutions conversation with the client?
- You need to cross borders to 'win the war' how can you achieve that?
- Is an in-house one-dimensional solution any good?

Chair

Michael Stanhope Chief Executive Officer & Founder Hubbis

Panel members

David Koay

Managing Director, Head of Wealth Management, Singapore & Malaysia Markets BNP Paribas Wealth Management

Lavanya Chari

Managing Director, Head of Global Products and Solutions, Asia Pacific Deutsche Bank Wealth Management

Simon Lints Chief Executive Officer - Singapore Schroders Wealth Management Lee Wong

Head of Family Services, Asia

Lombard Odier

Arjan De Boer

Head of Markets, Investments & Structuring, Asia

Indosuez Wealth Management

Speaker

9.50am WealthTalk

Family Business Transition

- Challenges faced by family businesses
- Role of governance

Lee Wong

Head of Family Services, Asia

Lombard Odier

10.00am Presentation

Whose assets are they anyway?

Peter Brigham Director Rosemont

• Issues surrounding the legal ownership and title of financial assets

10.10am Presentation

Catching the Wave - Alternative life insurance solutions for HNW customers

Stephen Hickman

Chief Executive Officer, Singapore & Southeast Asia Swiss Life Global Solutions

Swiss Life Global Solutions

10.20am WealthTalk

The key component of successful wealth transition

- The 3 success factors for smooth wealth transition
- Common mistakes to help your clients avoid
- How do you choose your specialists?

Gerard Gardner

Global Head Wealth Solutions

EFG Wealth Solutions

10.30am Refreshment & Networking

11.00am Presentation

Trust structures - products or relationships?

Aaron Mullins

Managing Director, Asiaciti Trust Singapore Asiaciti Trust

- · Why not all trusts and trustees are the same
- Helping clients understand what they are buying and why they should be careful and deliberate in their decision making

11.10am

WealthTalk

Wealth TALK Alternative solutions for HNW customers

- The attractiveness of Singapore
- Slowdown in Universal Life sales
- The impact of CRS and fiduciary changes
- The rise of variable products
- · Future of interest rates

Walter de Oude Founder Director Aviva Singlife

11.20am

WealthTalk

Using HNW insurance solutions for liquidity planning and guaranteed returns

Using HNW Insurance solutions - such as high and low life cover Universal Life, HNW clients can:

- Achieve higher returns, with a guaranteed strong minimum returns, better than a bank account rate
- Secure leveraging and liquidity whenever they need within an insurance policy
- Use insurance solutions for retirement and annuity planning, and effectively avoid probate through proper estate planning

David Varley

Chief Partnership Officer - Brokerage, International HuBS Sun Life

11.30am

Presentation

Singapore residents and other Asian residents holding UK assets

Helen Woods Managing Director, Equiom Solutions Equiom Group

- UK investments and planning during lifetime
- · Mitigating exposure to UK taxes
- Estate planning and UK Inheritance Tax

11.40am

Presentation

Investor migration and the rise of the global citizen

Scott Moore, IMCM Managing Director 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

11.50am WealthTalk

How to set up a family office / family trust

- Main drivers for setting up a family office or family trust
- Key features of a family office
- Key features of a family investor fund trust
- What about single family offices?

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

12.00pm WealthTalk

The different angles of transparency

- International initiatives, families' assets and transparency in communication between family members
- How do all three come together?

Britta Pfister Managing Director, Head Wealth Planning Asia Pacific Rothschild Trust

12.10pm Panel Discussion

Clients don't like to pay for advice – but are they are now hitting a 'brick wall'?

- Clients are so busy haggling over pennies have they have lost track of the big picture?
- How can we change this 'cheap' mind-set in Asia?
- Do clients understand what's critical and what's not?
- CRS who really understands it? How do clients get the 'right' advice about CRS and avoid the large amount of mis-information?
- Do clients trust banks enough to give them this opportunity? Who do they trust?
- Is there a conflict of interest still at most private banks that prevents the right level of engagement with clients?
- Do we need a more independent family office-type structure to serve clients better?
- Does a conversation around wealth solutions need to be independent and open architecture?
- Are wealth planners at private banks now frustrated and shackled? Are they just glorified insurance salespeople?

Chair

Michael Stanhope Chief Executive Officer & Founder Hubbis

Panel members

Woon Shiu Lee Managing Director, Head of Wealth Planning (Trust and Insurance) Bank of Singapore Britta Pfister Managing Director, Head Wealth Planning Asia Pacific Rothschild Trust

Anthonia Hui Chief Executive Officer AL Wealth Partners

Walter de Oude Founder & Chief Executive Officer Singapore Life

Shanker Iyer Founder & Chairman The Iyer Practice

Gez Owen Managing Director & General Counsel Hubbis

Speaker

12.55pm Lunch & Networking

1.40pm Panel Discussion

What do RMs need to do to improve in the conversation around wealth solutions?

- Most RMs have a poor understanding of the reality of their clients' situations how can they improve?
- How can RMs have a proactive, sensible and sensitive conversation around wealth solutions with clients?
- How do we broaden the conversation past just insurance?
- To move from simple to more complex how can RMs bring specialists and thought-leadership to clients? And customise a solution?
- What's the incentive for an RM to engage with wealth solutions internally or externally?
- Do RMs need to understand tax and governance issues? Where do these pieces fit into the puzzle?
- Should RMs discover and understand the legal structure of solutions to help evaluate risks and suitability for the client?

Chair

Michael Stanhope Chief Executive Officer & Founder Hubbis

Panel members

Gerard Gardner Global Head Wealth Solutions EFG Wealth Solutions

Mark Smallwood Managing Director Confidentem Private Office

Ian Black Head of Financial Planning and Wealth Solutions AAM Advisory Gary Tiernan Head of Investments Crossinvest

Richard Sayers Managing Director, Singapore Equiom Group

Jonathan Cheong Head of Default Risk Management and Solutions Ingenia Consultants

Speaker

2.25pm WealthTalk

The case for independent wealth planning

- The state of play in the wealth planning industry
- What the client needs
- · How to deliver it

Mark Smallwood Managing Director, North Asia Coverage Team Head Deutsche Bank Wealth Management

2.35pm WealthTalk

Preparing your clients for divorce

- The latest trends in international divorce
- Trust and pre-nuptial agreement issues

Marcus Dearle Partner, Head of Family Asset Protection - Private Client Berwin Leighton Paisner

2.45pm WealthTalk

Why funds are preferred over trusts for nextgen wealth transfer

- Fund structures are increasingly replacing trust structures for next-generation wealth transfer
- This is due to benefits of double taxation avoidance treaty (DTAT) benefits, ring-fencing
 of liabilities, segregation of assets, avoiding cross-pledge, ease of operations, etc

Sanjay Guglani Chief Investment Officer Silverdale Funds

2.55pm Refreshment & Networking

3.20pm Panel Discussion

Family businesses in Asia – how can YOU help them?

- How do you talk to families about succession and business issues?
- What do UHNW families in Asia need and how is this changing?
- What shared values should drive family behaviour?
- What's your role in all of this? How can you help set the family agenda and keep the

family together?

- How do you deal with the next generation?
- How should you advise families where the second-generation siblings have different personalities and strengths?
- How do you manage outcomes, process and fees?
- What governance structure can you put in place to minimise tensions and enhance longevity of the structure?
- How do you avoid working with the 'wrong' client? What do you do if it's not a win-win?
- What's the role of the family office?
- How do you deal with "love" and "fear" within families?

Chair

Michael Stanhope Chief Executive Officer & Founder Hubbis

Panel members

Kevin Lee Partner Zhong Lun Law Firm

Patricia Woo Partner Squire Patten Boggs

Nigel Rivers Founder and Chief Executive Officer Capital Solutions

Steven Seow Head of Wealth Management, Asia Mercer

Speaker

5.15pm Forum Ends