

China Wealth Management Forum 2015

8.40am Registration

9.00am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.10am Panel Discussion

Enhancing China's wealth management capability and capacity

- How big is the opportunity in China for wealth management? Is this growth sustainable?
- What motivates banks to want to do wealth management in the first place?
- Where do banks and other players most need to invest in their platforms to build long-term and sustainable businesses?
- How can you develop a brand in such a competitive market?
- What's the motivation for Chinese to offshore their wealth?
- How do you develop and design a proposition relevant for China?
- What's the opportunity for the growth in professional services?
- How are the barriers coming down to investing offshore? What is the most relevant product set to provide diversification and offshore investing?
- What direction are regulators and the government likely to take the market?
- Many asset management companies find it difficult to get partnerships in China. How can they overcome these hurdles?

Speaker

Danny Howell
Managing Director, Head of Offshore Wealth Management
CreditEase

Larry Cao
Senior Director, Industry Research
CFA Institute

Mark Ni
Partner, Tax and Business Advisory Services, Deloitte Private
Deloitte

9.50am Presentation
The future of fiduciary services in private banking

Peter Golovsky
Managing Director, Global Head of Institutional Sales
Amicorp Group

- State of play in the global trust industry
- Factors driving industry change
- Banks at a tipping point - strategic options and choices around delivering fiduciary services
- Opportunities and challenges from global tax transparency, FATCA, CRS

10.10am Presentation
Helping clients make the right decision

Larry Cao
Senior Director, Industry Research
CFA Institute

- How do clients decide?
- What are the clients' critical biases?
- Where do we go from here?

10.30am Refreshment & Networking

10.55am Arrival and refreshments

The evolution of family offices in China

- What is the definition of a 'family office' in China?
- What's the opportunity to service this segment?
- What's required to set up a family office?
- What size of client is the best to work with?
- They want to invest with people with some 'skin in the game'. Where are the real opportunities to provide relevant access to capital markets and other investment opportunities?
- How can you create more connectivity between the business and family for their wealth management needs?
- To what extent are services like estate & succession planning, tax planning, and alternatives citizenship integral to the offering?

Crystal Jiang
Founder/Partner
DL Family Office

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

Lefan Gong
Partner
Zhong Lun Law Firm

Kristy Calvert
Managing Partner, Shanghai
Harneys

Peter Brigham
Director
Rosemont

11.35am Presentation
"The trust is dead" myth

Peter Brigham
Director
Rosemont

- Trust and fiduciary business under pressure from various difference angles

- But a bright future promised if it adapts to the new world order

11.55am

Panel Discussion

How can you compete in the digital race in China?

- To what extent are mobile, digital and social media trends reshaping wealth management in China?
- Will this continue?
- Are you making the most of the technologies and channels which exist?
- Where is the biggest scope for disruption?
- Which players will be the winners and losers in the next 5 to 10 years in digital?
- What is the role for fintechs in China wealth management?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Ray Chou
Principal
Bain & Company

Johnson Chng
Founding Partner
A.T. Kearney

Chris Powers
Manager, Consulting
Z-Ben Advisors

Percy Chan
General Manager, Wealth Management Division, China Bank of East Asia
Bank of East Asia

12.30pm

Forum Ends