

# China Wealth Management Forum 2016

8.40am Registration

9.00am Welcome Address

9.05am Panel Discussion

Wealth management in China - how can we take it to the next level?

- What's the opportunity that the wealth in China represents to you? How is it likely to develop?
- How do wealth management propositions, platforms and processes need to improve?
- How are the different business models evolving in the onshore wealth management market? And which one is most likely to win out in the long run?
- Which client segments should you focus on to be profitable? And how should you tailor your offering to them?
- Amid many scandals and cases of mis-selling – what do the regulators along with other stakeholders need to do to facilitate a more robust market?
- Can foreign banks create a profitable and sustainable offering?
- Should they compete or collaborate with onshore institutions?
- How can you participate in the increasing offshoring of Chinese wealth?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

William Xia  
Founder & Chief Executive Officer  
AOW Financial Planning

Lefan Gong  
Partner  
Zhong Lun Law Firm

Jonathan Ha  
Founder and CEO  
Red Pulse

Jeff Li  
Chairman  
Sycamore Investment Services

Ray Chou  
Partner, Wealth Management & Asset Management Practice Lead  
Oliver Wyman

9.45am Presentation  
Residence and citizenship planning for Chinese families - an overview

Bill Wu  
Director of Business Development, Hong Kong  
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

10.00am

Presentation  
Transparency, the new minimum standard

An Kelles  
Director GCC  
Jersey Finance

- The political economy
- Recent developments
- Public Registers – the new global standard
- Transparency in practice
- Why Jersey?

10.15am

Panel Discussion

What can we learn from wealth management markets elsewhere in Asia?

- What are the trends and best practices in wealth management across Asia?
- What is the stage of development of the industry in the more developed hubs of Hong Kong, Singapore and Australia?
- How is wealth management evolving in developing markets in Asia?
- What lessons can we learn from the journeys in these markets so far?
- What are some of the steps that regulators across Asia have taken to facilitate industry growth?
- What's the role that Hong Kong and Singapore will play in future access to China's wealth?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Ignatius Chong  
Head of Enterprise Private Clients, Asia  
Royal Bank of Canada

Tuck Meng Yee  
Partner and Founder  
JRT Partners

Dennis Wan  
Managing Director, Head of Sales, Asia  
Commerzbank

Michael Shue

Executive Director, Trust Services, Hong Kong  
Vistra Private Wealth

10.55am

Refreshment & Networking

11.25am

Presentation  
Capturing alpha from non-traditional sources

- The market is getting more efficient in absorbing information – we need a better way to find alpha
- Alternative sources of value creation – contingent assets
- The market remains inefficient in absorbing non-financial data
- Wise risk management to capture genuine alpha from various betas

[Sharon Yang](#)

Executive Director, Head of Greater China Coverage  
RBC Global Asset Management

11.40am

Presentation  
US growth equities – reasons to be bullish... making America grow again

Don Klotter  
Managing Director,  
EFG Asset Management

- The likely impact on the markets in the world of Donald Trump as the next US President
- What will be the investment opportunities in this environment?

11.55am

Presentation  
The development of asset management in Hong Kong

Eleanor Wan  
Chief Executive Officer  
BEA Union Investment

- Assets managed in Hong Kong
- Fund management business staff profile
- Growing Mainland participation in the Hong Kong market
- Fund flows

12.10pm

Presentation  
Pre-IPO trust structures for private family trusts and employee benefit schemes

Michael Shue  
Executive Director, Trust Services, Hong Kong  
Vistra Private Wealth

- What are the major considerations of pre-IPO trust planning?

- What are benefits of pre-IPO trust structures for Private Family Trusts and Employee Benefit Schemes?
- How can you leverage a trust for pre-IPO planning?
- How to structure effective pre-IPO trust planning?

12.25pm

#### Panel Discussion

How to enhance the product and advisory proposition in China

- What are the biggest opportunities and challenges for the asset management industry in China?
- There is still a product-pushing mentality in China, and a lot of local investors are still very self-directed in terms of where, what and how to invest – how can we change that?
- What can we do to better educate customers and improve the levels of service and overall client experience?
- Domestic markets remain the major investment focus and allocation for wealthy Chinese, despite growing internationalisation of their investment strategy. What can we do to create and encourage global asset allocation?
- What products are Chinese investors looking for to create this diversification?
- With appetite moving beyond just investment products – what skills do we need to service wealthy Chinese investors?

#### Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

#### Speaker

Bing Rong  
Executive Director, Investment Product  
CreditEase

Patricia Thomas  
Chief Executive Officer & Founder, Asia  
IRM Family Office

Rex Sui Yan Lo  
Managing Director  
BEA Union Investment

Qi Wang  
Chief Executive Officer  
MegaTrust Investment

Sharon Yang  
Greater China Coverage  
RBC Global Asset Management

1.05pm

#### Lunch & Networking

1.50pm

#### Panel Discussion

Going digital - enhancing the engagement with customers

- What does digital mean in Chinese wealth management?

- What more can we do? What are the possibilities?
- Do we have adequate tools to engage the customer - and help them become investors?
- How can we use digital and social media more effectively to empower investors to transact by themselves?
- What can we do to improve online and mobile applications and other tools?
- How can we grow the peer-to-peer lending business? What is its role in the industry going forward?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Adeline Tan  
Partner, Wealth Business Leader  
Mercer

Jeroen Buwalda  
Partner, APAC Wealth and Asset Management Advisory Lead  
EY

Lin Zhu  
Analyst  
Red Pulse

2.30pm

Presentation  
EY's Global Wealth Management Survey 2016

Jeroen Buwalda  
Partner, APAC Wealth and Asset Management Advisory Lead  
EY

- EY's wealth management practice surveyed more than 2,000 individual clients and 60 wealth management senior executives globally to demystify client experience and uncover potential revenue opportunities for wealth managers
- There is approximately USD120 trillion of client assets managed by global wealth managers, and 4 out of 10 clients are open to switching wealth managers under the right circumstance
- This represents a USD175 billion to USD200 billion global revenue opportunity for those firms willing to make strategic investments to deliver a superior client experience, while others may find themselves at risk of losing a substantial portion of their current business

2.45pm

Presentation  
Digitalisation of wealth management

Shyh Jih Lee  
Business Solutions Manager, Asia  
ERI

- Global challenges in wealth management
- How can digitalisation address these challenges?
- Security

3.00pm

## Presentation

How should you service wealthy Chinese clients?

William Xia

Founder & Chief Executive Officer

AOW Financial Planning

- What do wealthy Chinese clients want from their wealth manager?
- How do they want to be serviced?
- How do you approach conversations with them?
- What products should you be offering to clients?
- How can you be relevant today?

3.10pm

## Head - to - Head Q & A

Developing an independent asset manager model

Dr. Daniel Brunner

Executive Director, Senior Client Relationship Manager

TriLake Partners

- How can you manage the assets of your clients and related bank relationships from a total portfolio perspective?
- How does this enable you to help clients with estate planning by connecting them with the right specialists?
- What is the value of IAM office work such as consolidation, reporting, etc?
- Is there scope for extending services to concierge, education, real estate etc?

3.20pm

## Panel Discussion

How can we take a longer-term view of wealth management in China?

- Are we able to become providers of solutions not products?
- Money is being made selling sub-standard products. So what's the incentive to do anything new or different?
- How can we move towards more of a financial planning-type approach?
- How can we help HNW and UHNW clients in China move more quickly from their focus on investment returns towards wealth preservation and inheritance?
- When will there be higher competency standards in China?
- How can we improve the experience, education and examination requirements for wealth managers in China?

Chair

Michael Stanhope

Founder & Chief Executive Officer

Hubbis

Speaker

Hu Hong

Head of Business Development, China

Bank of Singapore

Grant Mao

Head of Business Development & Training, High Net Worth, China

AIA

Alvin Ma  
Senior Managing Director, Co-Head of Private Banking  
EFG International

Andrew Hardie  
Principal, Hong Kong  
BCG

Michael Huddart  
Executive Vice President & General Manager Greater China  
Manulife

4.00pm

Forum Ends