China Wealth Management Forum 2018

8.40am	Registration

9.00am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.05am Panel Discussion

How is the wealth management offering in China developing?

- How are the different business models evolving in the onshore wealth management market?
- Where will the continued growth come from and what are the priorities? How do you scale your business?
- What products and services are offered to wealthy clients and how is this developing?
- What does the private banker of tomorrow look like in China?
- How do the different players – wealth management, securities firms, insurance and banks compete or complement each other?
- What changes are we seeing in client expectations and behaviour? • How is regional wealth management developing in comparison?
- How can we find the right talent? And grow it?
- What are some of the trends we are seeing in Residence and Citizenship-By-Investment Programmes?
- Are there any 'real' family offices in China? What do they do? What are their needs?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Kimmis Pun
Managing Director, Head of Private Banking, Singapore
VP Bank

Richard Straus
Senior Managing Director, Head of Private Banking - Hong Kong
EFG International

James Wu
Founding Partner
Triumph Capital

Ray Chou
Principal
Bain & Company

Stanley Chao
Co-Founder and Head of Data Science
Red Pulse

Elvis Liu Cheng
Client Advisor
Henley & Partners

9.50am Presentation
ETF Evolution

Geir Espeskog
Head of Wealth Management SEA
BlackRock

Exchange traded funds (ETFs) have experienced explosive growth over the past decade, exceeding $4 trillion in assets under management to date. According to the Global ETF Research 2017 report by Ernst and Young, ETFs are expected to reach $7.6tn by 2020 and exceed active funds by 2027. In this session, we explore why ETFs have become so popular, some of the prevailing trends impacting Asia and the world, and how investors are using ETFs in their portfolios.

10.20am Panel Discussion

Building investment capacity and capability

- What positive developments have there been in the investment management industry in the last 12-months?
- What are the biggest opportunities and challenges for the asset management industry in China?
- What scope would you like to see for local and overseas asset managers to collaborate more?
- How is the product offering for Chinese HNW clients evolving?
- What are the expectations of HNW clients? How does this compare to clients outside China?
- What new investment products will be popular in the next 12-months?
- How are you thinking about fund selection and portfolio construction?
- How will clients increasingly diversify their portfolios?
- What's the role of digital?
- Are we Incentivising the right behaviour to get to sustainable earnings for the organisation and the right outcomes for clients?
- What can we do to better educate customers and improve the levels of service and overall client experience?
- How do Chinese clients think about risk? Do they manage it appropriately?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Perry Qiu
General Manager of Global Investment
DEL

Myung Je Park
Director
BlackRock

Lu Kang
Executive Director and Special Assistant to the Chairman

Chasestone Capital

Marco Liu
Investment Consultant
Mercer

11.05am Refreshment & Networking

11.30am Keynote Address

Keynote remarks from the Chief Minister of Jersey

Senator John Le Fondré
Chief Minister
Government of Jersey

11.40am Workshop

Private Banking into the Future: What's the latest trend of private banking in Asia?

Kimmis Pun
Managing Director, Head of Private Banking, Singapore
VP Bank

- What are the some of the trends we are seeing today in Asian Private Banking?
- How are the needs of wealthy clients in Asia changing?
- What are the challenges that the industry faces today?
- How will the investment offerings change in the next few years?

12.10pm Presentation
Digitalization to Gain Competitive Advantage in Wealth Management

Tony Yiu
Sales Director, Greater China Region
ERI

- Client centricity in Digital Wealth Management
- Digitalization Advisory Model
- Digitalization Benefits to Wealth Manager

12.20pm Panel Discussion

TECH / DIGITAL = Faster, cheaper and better wealth management?

- What's the potential for non-banks and other start-ups to eat into existing market share of organisations built on a traditional business model?
- What are the priorities when it comes to digital and technology?
- What digital trends are we seeing elsewhere?
- Platforms and processes – whats the role of digital?
- What is the client experience supposed to look like? How is it evolving?
- Have we seen any examples of tangible success in digital wealth management?
- How should banks decide what's working? What KPIs should we use?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Manli Zhu
Director, FSO Advisory - Performance Improvement
EY

Tony Yiu
Sales Director, Greater China Region
ERI

Tammy Tan
Managing Director
BCG

William Barkshire
Head of Strategy Greater China
FNZ

Aina Dai
Sales Manager
Interactive Brokers

1.05pm	Lunch & Networking
1.50pm	Workshop

Leading Residence and Citizenship-By-Investment Programmes

Serena Wang
Senior Manager
Henley & Partners

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

2.20pm 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

2.30pm Presentation

The Major legal challenges facing Chinese high wealth individuals

Michael Ma
Partner
Dentons

- The influence of CRS and PRC Individual Income Tax Law 2018
- Domestic tax compliance in China
- Overseas tax compliance

2.40pm Panel Discussion

Helping wealthy families with their legacy and succession planning

- What are the needs of wealthy Chinese Families?
- The globalising of Chinese wealth and what trends to watch?
- How are they dealing with legacy and succession planning?
- How do you have a conversation with clients around sensitive family issues?
- New tax developments? • What’s the role of insurance in this mix?
- What are the practical considerations for HNW clients in wealth protection and transfer?
- How are these needs developing? And how can you help clients understand these needs?
- What trends are we seeing in Philanthropy?
- How do wealthy clients structure their non-investment assets?
- Do clients really understand the needs they have?
- What's the role today of international financial centres?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Dharshi Wijetunga
Partner
Anaford Attorneys

Irene Lee
Business Development Director, Intermediary and Partnership
Hawksford

Kristy Calvert
Managing Partner, Shanghai
Harneys

Richard Nunn
Regional Head, East
Jersey Finance

Kimmis Pun
Managing Director, Head of Private Banking, Singapore
VP Bank

3.30pm Forum Ends