

# China Wealth Management Forum 2019

8.40am Registration

8.55am Welcome Address

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

9.00am Panel Discussion

Wealth management in China – grasping the opportunity

- Who are the players? What's their USP?
- Where are the biggest opportunities and challenges for the private wealth management industry in China?
- Offshore / onshore. Where is the long-term opportunity?
- What progress is needed to boost the onshore investment proposition?
- Delivering investment products and advice to clients – How can you differentiate yourself?
- What digital expectations do clients have?
- What are the key digital trends and how are they changing the business?
- Are retail investors in China who access funds via digital platforms beginning to diversify away from money-market funds? Will this create opportunities for ETFs and active funds?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Jonathan Ha  
Founder and CEO  
Red Pulse

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

Leo Shen  
China Wealth Leader  
Mercer

Ray Tam  
Managing Partner & Co-Founder  
Raffles Family Office

9.50am Presentation  
The digital watch or the hand-made Swiss?

Kimmis Pun  
Managing Director, Head of Private Banking, Singapore

VP Bank

- How is private banking developing?
- How do you add value and differentiate yourself?
- What are the different business models you can consider?

10.05am

Presentation  
Smarter Humans. Smarter Machines

Patrick Donaldson  
Global Head of Wealth Solutions, Sales Strategy & Execution  
Refinitiv, an LSEG Business

- The devil is in the data: data quality is the biggest barrier to the adoption and deployment of machine learning.
- AI will be the single greatest enabler of competitive advantage in the financial services sector.
- There is disparity in how technologies are being adopted and used around the world. Financial institutions in the United States and Canada are the front-runners; Asian institutions are more advanced than Europe in some areas, while Europe leads Asia in others.

10.20am

Presentation  
The continuing development of Family Offices in China

Leo Shen  
China Wealth Leader  
Mercer

- Key developments
- Mercer's insights
- Case studies

10.40am

Head - to - Head Q & A

GOLD – shining brighter every day

Christophe Numa  
Managing Director  
Bunker Group Gold & Silver

- Why is this a good opportunity today?
- What are the key reasons why you should invest in precious metals?
- Where should you keep your Gold?

10.50am

Head - to - Head Q & A

Understanding Blockchain & Cryptocurrency

Alexandre Kech  
Director, Blockchain and Digital Asset

Citi

- What is the Blockchain? How will it affect this industry?
- What is cryptocurrency and is there an investment trend?
- How do we safeguard digital assets like the security we get with traditional investment in shares and bonds?

11.00am

Refreshment & Networking

11.30am

Presentation

International Finance Centres: past, present and future

An Kelles

Director GCC

Jersey Finance

- How IFCs have evolved and what the future now holds
- Beneficial ownership: what just happened?
- White Paper: The Evolution of family offices in Asia - Views from Asia's Wealth Management Community

11.45am

Panel Discussion

Trends in Wealth Structuring and Legacy Planning in China

- Curating the right solution for clients – what's thrown in the mix today?
- What are the most common concerns of HNW & UHNW clients?
- What specific trends are we seeing from Chinese clients?
- How is the importance of International Financial Centre's changing?
- Are clients 'stress testing' existing trust structures with a particular focus on protecting against external risk: political instability, divorce, bankruptcy etc?
- What is the key driver today for structures?
- Are clients seeking to make their structures simpler or more complex? Why?
- How well prepared are Chinese clients for wealth transition? Is time of the essence?
- In which jurisdictions do Asia's wealthy prefer to house their structures? Why?
- Why is Asia witnessing a proliferation of single-family offices (SFOs) and multi-family offices (MFOs)?
- What's the role of Immigration and Residency Planning?

Chair

Michael Stanhope

Founder & Chief Executive Officer

Hubbis

Speaker

Ivan Pelle

Founder & CEO

RGN

Alice Quek

Head of Private Client Services, Asia

Hawksford

An Kelles

Director GCC  
Jersey Finance

Cong Zhang  
Partner  
EY

Ceri Pratley  
Residency and Citizenship Consultant  
The Sovereign Group

Elvis Liu Cheng  
Client Advisor  
Henley & Partners

Ying Song  
Founder, Chairman and CEO  
Youmywealth

12.30pm

Presentation  
Popular Residence and Citizenship Programs for HNWIs

Serena Wang  
Senior Manager  
Henley & Partners

- About Henley & Partners
- Alternative options for the HNWIs
- Popular Residence and Citizenship Programs for HNWIs

12.50pm

Presentation  
Revisiting Family Governance

Alice Quek  
Head of Private Client Services, Asia  
Hawksford

Will your family destroy your wealth, or will your wealth destroy your family?

Family dynamics should always be considered by Wealth advisers when structuring a wealth succession plan. In this presentation Alice Quek will consider relevant family issues surrounding the succession of wealth, be it family governance, what's in a family constitution, the impact of divorce, second marriages, balancing the expectations of children or the effects on family wealth of living longer.

1.00pm

Presentation  
Food for thought: CRS / AEOI – Practical experiences

Ivan Pelle  
Founder & CEO  
RGN

- CRS Common Reporting Standard – Developments - Participating vs Permanent Non-Reciprocal Jurisdiction

- AEOI Automatic Exchange of Information - Transparency & Tax Planning – Territorial vs WWI taxation
- AEOI and CRS practical experiences

1.10pm Lunch & Networking

2.00pm Forum Ends