

Digital Wealth - Asia 2016

8.40am Registration

9.00am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.05am Keynote Address

Digibank India - revolutionising a market

Olivier Crespin
Chief Fintech Officer
CIMB

- What went into creating India's first mobile-only bank?
- What does this mean for the future of digital wealth?
- What's next for DBS in digital banking in Asia?

9.20am Panel Discussion

The role of digital and fintech in the future of wealth management

- What should CEOs be thinking about today?
- What is your digital strategy?
- How will you change the client experience?
- Does anyone have a clear and differentiated digital strategy?
- How can we 'walk the talk'?
- What's the potential and impact of Artificial Intelligence in the future?
- What's the real priority when investing in technology?
- How do we measure the success of our digital wealth initiatives?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Terence Tam
Executive Director, Head of Wealth Management Technology, Asia ex-Japan, Global
Information Technology Division
Nomura

Damien Mooney
Managing Director, Head of Aladdin Wealth Tech for Asia Pacific within BlackRock
Solutions
BlackRock

Michael Leung
Chief Information & Operations Officer

China CITIC Bank International

Eric Ben-Artzi,
Head of Risk Analytics
BondIT

Steve Monaghan
Regional Director - Head of Edge (Group Innovation)
AIA

Frank Troise
Managing Director, Head of Digital Distribution (Asia)
Leonteq

10.05am

Head - to - Head Q & A

Bringing people into the digital age

Hans Peter Wolf
Chief Executive Officer & Founder
Appway

- How do we do this?
- What are the opportunities and challenges?

10.15am

Presentation
Wealth management for the digital age customer

Abhra Roy
Senior Product Line Manager and Head, Finacle Wealth Management
Infosys Finacle

- With rapidly-changing customer needs and unassailable digitisation, the wealth management industry needs to evolve towards a truly customer centric, technology-based and service-driven value proposition
- This presentation explores the agents of change and the transformations in the financial services and wealth management spaces for the digital age customer

10.25am

Refreshment & Networking

10.55am

Panel Discussion

Change management or change the management?

- Do we have the right mind-set to foster and drive change?
- Who's got it right so far? And who hasn't?
- What do you need to do to motivate and infect large numbers of people in your organisation with the digital 'bug'?
- How do we go from planning to innovation to transformation?
- Do it yourself, or get help from outside?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Michael Haupt
Chief Operating Officer, Investment Advisor, Asia Pacific
Vontobel Asset Management

Yai Sukonthabhund
Chief Executive Officer
Crossbridge Capital

L Wymann
Partner
Orbium

Salomon Wettstein
Co-CEO
Synpulse

11.40am

Presentation
Getting your digital bank ready

Mark Buesser
Chairman
IMTF

- Insights and trends of Swiss & Central European banks' digital journey
- Focusing on achieving client centricity and efficiency
- Low hanging fruits of technology: ICOS/2
- Aligning your strategy to succeed in the digital space

11.50am

Presentation
The impact of digitisation in wealth management

Frank Henze
Practice Lead - Financial Services IT
Trimantium GrowthOps

- Opportunities and challenges
- Driving a digital agenda
- Clients, advice and investments in a digital world

12.00pm

Panel Discussion

Fintech: fantasy or reality?

- Everyone who writes a line of code calls themselves a 'fintech'. What's the real definition of a 'fintech'?
- Will fintechs rule the world, or implode?
- Is there any genuine disruption? And are there any new fintechs now, or just bad copies?
- Collaborate or die. But who do you partner with?
- Human advisory versus robos. How can they co-exist?
- How can it be used in the bank today?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Jonathan Ha
Founder and CEO
Red Pulse

Mathias Helleu
Executive Chairman
8 Securities

Ned Phillips
Founder and Chief Executive Officer
Bambu

Julian Kwan
Co-Founder and CEO
InvestaX

Stephane Dubois
Founder and Chief Executive Officer
Xignite

12.45pm

Lunch & Networking

1.35pm

Panel Discussion

Regulation and compliance - what can technology really do to help?

- What are the regulatory and compliance challenges you face today?
- What can technology do to help?
- Is more coordinated risk management and compliance a priority?
- How can we design and define a flexible approach?
- How do we prepare for the regulatory challenges of tomorrow?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Kelly-Ann McHugh
Head of Regulatory Intelligence, Proposition - Asia Pacific and Japan, Financial & Risk
Thomson Reuters

Deborah Repak
General Manager, Products
First Rate

Amar Bisht
Head of Wealth Strategy and Advisory
Orbium

Markus Werner
Intermediaries in the Principality of Liechtenstein
LGT Bank
Presentation

2.20pm

Compliance and customer experience: friends, not enemies

Igor Djurdjevic
Business Practice Manager
Appway

- Wealth managers have to follow regulations, but how can they leverage compliance to provide the best possible customer experience?
- With a flexible IT infrastructure, wealth managers can outperform competitors in terms of customer-centricity and compliance readiness
- What technology do wealth managers need to cater to client needs and wants, while ensuring compliance to current and future regulations?

2.30pm

Presentation
Digital wealth management – is your strategy on-track?

John Robson
Chief Commercial Officer
Quantifeed

- Is engagement at the core of your client servicing?
- How today's technology delivers investment journeys to help customers reach life goals.
- AI: Artificial Intelligence or Automated Investing?

2.40pm

Head - to - Head Q & A

Digitsing distribution – an emerging market perspective

Steven Mantle
Head of Marketing & Investor Relations
PXP Vietnam Asset Management

- For funds distribution channels – what can be done to implement easier platforms for investors?
- How can banks and fund houses collaborate in this way?
- What's the best approach to reach the end-user most effectively and cost-efficiently?
- Given young populations in countries like Vietnam – what's the best way to communicate and service their needs?

2.50pm

Presentation
Data management as a service

Marko Milek
Head of Global Exchange, APAC
State Street

- Most common problems with (investment) data management
- Economy of scale – why does the service model make sense?
- Where are we at, and what's likely to come next?

3.00pm

Refreshment & Networking

3.30pm

Panel Discussion

What will you be in the future: a platform? A product manufacturer? Or a distributor?

- Can we be all-things-to-all-people?
- How do you fit into the digital ecosystem?
- Will 'blockchain' have any real impact on banking?
- What does this mean for private banks, retail banks and asset management companies?
- How will this either improve revenues or cut costs?
- Will tech giants rule banking?
- What does the bank ecosystem look like in the future? How open and connected do you become?

Chair

Michelle Stanhope
General Manager
Hubbis

Speaker

Charlie O'Flaherty
Head of Digital Strategy & Distribution
Crossbridge Capital

Phil Neilson
Founder and Managing Director
Just Service

Bobby Bok
Head of Wealth Management Solutions, North Asia, Financial & Risk
Thomson Reuters

Frank Henze
Regional Head of Digital Transformation, APAC
Euler Hermes

4.15pm

Panel Discussion

Innovation - enhancing the client experience

- Everyone is competing against everyone – what do you need to do to stand out?
- How can you be relevant? And also adapt and change every year?
- The landscape in China is changing quickly – how are the innovations driving disruption?
- How do you need to change the client experience?
- What are the needs of our customers? How are they changing the dynamics of their relationships with their wealth managers?
- What are the emerging technologies that will shape our world?
- Millennials create a unique conundrum for big banks - how should you cater to their digital expectations?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Donald Soo

Chief Executive Officer
Orb Global Wealth Management

John Robson
Chief Commercial Officer
Quantifeed

Eddie Thai
Venture Partner
500 Startups

Michael Gerber
Chief Executive Officer
360F

5.00pm

Forum Ends