Digital Wealth Asia 2017

8.40am Registration

8.55am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.00am Keynote Address

Credit Suisse's successful digital transformation - a look back and ahead

Urs Lichtenberger
Director, Client Platform, Asia Pacific
Credit Suisse

- What does it take to be truly multi-channel digital? Where does Credit Suisse stand on its award-winning Digital Private Bank? And how is it used?
- Digitising one of the most 'cumbersome' processes in private banking: account opening
- How to digitise an RM's daily work?

9.10am Panel Discussion

How do you future proof your business?

- How will firms in Asian wealth management use technology and digital to improve the business?
- What's innovative, interesting or challenging to you?
- How do you create an ecosystem that genuinely embraces fintech?
- What will firms be spending money on next year? Is your technology budget getting bigger?
- How do you select vendors today?
- How do you view the different regions from a technology perspective?
- What are the trends in Regtech?
- How do you feel with the security risk that comes with digitisation?
- What stops your private banker from communicating in ways they should not?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

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

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

Mark Buesser
Chief Executive Officer
IMTF

Marko Milek
Head of Global Exchange, APAC
State Street

Thomas Achhorner
Global Head of Solutions
additiv

Ian Woodhouse
Senior Business Advisor
Orbium

Speaker

9.55am Presentation
Wealth management just got a new name

John Robson
Chief Commercial Officer
Quantifeed

- We all have new expectations
- Technology is not the solution
- Crafting the right digital experience

10.05am Presentation
Driving growth through digital wealth management

Jeson Liu
Head of Greater China
FinIQ

- Delivering a client-centric wealth management offering
- Creating a unified front-to-back office platform

10.15am Presentation
Digital Advisory Life Cycle

Martin Frick
Managing Director, Asia Pacific
Temenos

- How technology can support life cycle
- Leveraging FinTech technology

10.25am Refreshment & Networking

10.55am

Presentation
Robo-advisory for a more efficient front-office

Mark Buesser
Chairman
IMTF

- Automating complex regulations
- Digitising the client relationship
- Achieving client centricity and efficiency with ICOS/2

11.05am

Presentation
Turning information into insights

Marko Milek
Head of Global Exchange, APAC
State Street

- If data is the next natural resource, how will investors best harness it?
- What analytical frameworks need to be developed?
- Why are actionable insights the ultimate goal?

11.15am

Presentation
Enabling digital wealth options in Asia

Bhaskar Prabhakara
Founder & Chief Executive Officer
WeInvest

- How to make digital wealth a reality within your institution?
- Options for different segments: account aggregation, robo-advisory, hybrid advisory, thematic investing options, Sharia-compliance
- Regulatory progress and constraints across the region
- Organisational constraints to overcome

11.25am

Presentation
Using technology to manage the changing traditional client trust paradigm

Donald Soo
Founder and Group Chief Executive Officer
KoiZai

- Solving some real problems
- Enabling you to have a more holistic and advice led approach

11.35am

Presentation
The Cloudification of Capital Markets - Market Data APIs Allow Banks to Innovate at the Speed of a Fintech

Stephane Dubois
Founder and Chief Executive Officer
Xignite

11.45am

Presentation
Natural capital, blockchain, and the future of wealth management

Seamus Donoghue
Vice President of Business Development
Allocated Bullion Solutions

- Investing in the world's most promising asset class
- Diversification and portfolio risk mitigation impacts
- Net positive portfolios

11.55am

WealthTalk

From secrecy to transparency

- How sharing of client information is the new way to play for bankers in the digital age?
- Are Private Bankers worried about the fact digital allows the bank to directly interact with clients?
- How does voice to text and analytics give banks further control over the banker and their client interaction?

Michiel van Selm
Chief Operating Officer
Canopy

12.10pm

Presentation
Truly Digital Wealth Management

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

- Focus on the Customer Key Technology Drivers
- Have we forgotten the back office?
- Innovations

12.20pm

Panel Discussion

Is 'ROBO' and 'NEW STUFF' gaining any real ground?

- What's your value proposition and why will it be successful?
- What does the term 'Robo' mean to you?
- Have consumers, banks and consultants really embraced 'new stuff'?
- Who will rock the boat?
- What does the platform of tomorrow look like?
- Is it likely that the traditional investment process will change?
- What does a proper business case for digital look like?
- How are FinTech companies partnering with larger more established institutions?
- What makes these partnerships work - what both sides are looking to achieve?

- Who invests in FinTech companies?
- What has emerged from any of the Incubators, Labs and other initiatives?
- There has been lots of talk – but what's next?
- Whats really under the lid? Is there any genuine innovation?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Mathias Helleu
Executive Chairman
8 Securities

Ned Phillips
Founder and Chief Executive Officer
Bambu

Phil Neilson
Chief Executive Officer
Just Service

Alex Ypsilanti
Chief Executive Officer and Co-Founder
Quantifeed

Bhaskar Prabhakara
Founder & Chief Executive Officer
WeInvest

Donald Soo
Group CEO and Founder
Malabar AI Limited

Speaker

1.05pm Lunch & Networking

1.55pm Panel Discussion

Demystifying all the Fintech hype

- Making sense of crypto and blockchain - what are the real applications & implications in financial services?
- What are the lessons to be learned so far from elsewhere in the world?
- Where should you be based? Hong Kong, Singapore or China?
- What are the Legal & Ethical Challenges?
- Could AI recalibrate wealth management in Asia?
- Will machine learning transform investment strategies?
- Are the smart algorithms in the background driven by actual investment professionals or just tech kids in the garage?
- How should robos be regulated? And what impact will this have on their potential?
- What will be the impact of AI on the investment process? How will it evolve over time?

Chair

Christophe Lee
Founder
JP Asia Partners

Panel Members

Julian Kwan
Chief Executive Officer
InvestaCrowd

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

Seamus Donoghue
Director
Lykke

Adrian Gostick
Chief Revenue Officer
BondIT

Ralph Mogicato
Entrepreneur, Independent Senior Advisor, Professional Board Member, Angel Investor
Swiss ICT Investor Club

Speaker

2.45pm

Presentation
Transforming Business Models via a RegTech Ecosystem

Ian Woodhouse
Senior Business Advisor
Orbium

Amar Bisht
Head of Wealth Strategy and Advisory
Orbium

- Short-term headwinds facing Private Banks
- Cost challenges of traditional operating models (inefficient and inflexible)
- The essential move along the value chain to address cost challenges
- Prioritizing investments and automation to support this move
- Driving innovation through an ecosystem of digital partners
- Future C level challenges and opportunities

3.00pm

WealthTalk

The emergence of hybrid advisory models

- What's the digital business model of the future?
- What's the evidence to support this?
- What should banks be doing to prepare and position themselves in line with these trends?

David Wilson
Senior Vice President
UOB Bank

3.15pm

Presentation
The Future of Wealth

Mathias Helleu
Executive Chairman
8 Securities

- A preview of what a 100% digital relationship without an advisor could look like

3.30pm Refreshment & Networking

4.00pm Presentation
End to end digitisation in wealth management - trends and outlook

Frank Henze
Practice Lead - Financial Services IT
Trimantium GrowthOps

- Evolution of digitisation from back to front office
- Increasing use of data, cloud computing and AI
- Current stumbling blocks and outlook

4.10pm Panel Discussion

How do we embrace digital and technology?

- Next generation wealth management – what will it look like and what does it mean to you?
- Wealth advisory services – how are they impacted by digital?
- How should bankers embrace digital?
- How can you save time and money?
- How will digital provide new insight into their clients and what is the best way to service them?
- Can you outsource the boring but important stuff?
- Can you quantify what it does? What are the KPIs?
- How can you deal with all the operational issues and keep secure?
- Database security and cyber security – what does this mean to you?
- Regulation and compliance - what can technology do to help?
- What will you be in the future: a platform? A product manufacturer? Or a distributor?
- Millennials create a unique conundrum for big banks - how should you cater to their digital expectations?

Chair

Christophe Lee
Founder
JP Asia Partner

Panel members

Michiel van Selm
Chief Operating Officer
Canopy

David Wilson
Head of Asia Wealth Management
Capgemini

Frank Henze

Practice Lead - Financial Services IT
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Amar Bisht
Head of Wealth Strategy and Advisory
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Urs Lichtenberger
Director, Client Platform, Asia Pacific
Credit Suisse

Abhra Roy
Head, Finacle Wealth Management Solution
Infosys Finacle

Speaker

5.00pm	Forum Ends