

# HUBBIS DIGITAL WEALTH FORUM - Singapore 2022

8.30am Registration

8.55am Welcome Address

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

9.00am Panel Discussion - in partnership with Refinitiv, an LSEG Business

Wealth Leaders Perspective – Evolving the business in more challenging times

We all know of the global investment market dislocations taking place as inflation surges and interest rates are hiked in Europe and the US in particular. We all know how uncertain the world's geopolitics are, not least as Russia continues its assault on Ukraine, but also amidst fears over China's intentions towards Taiwan, North Korea's unpredictability, and the potential dangers lurking should Iran become nuclear capable. And we can all see the dangers to society of collapsing real incomes, slumping profitability and declining consumer confidence.

Yet at the same time, employment in the wealth management markets is still robust; indeed, there is a war for talent across the board, from front to back office, and with remuneration packages escalating even as revenues fall or perhaps look set to weaken further.

Does this mean that digital transformation is being derailed, or does it mean that it is being prioritised as the wealth management community seeks to boost efficiencies and rein in costs? Many experts believe it is the latter case – that much discretionary spend is getting cut, but there is ongoing investment in digital transformation that will have a longer-term positive impact on costs and help improve the productivity of key RM and advisor talent, as well as improving predictability, reliability and scalability, including around DPM and Advisory-led wealth management.

Chair

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

Speaker

Evrard Bordier  
CEO and Managing Partner  
Bordier & Cie

Nayeem Khan  
Chief Operating Officer - BPCAL and South Asia  
Pictet

Chooake Wongwattanasilpa  
Chief Experience Officer (CXO), CX & Design  
Bank of Singapore

9.30am Presentation  
Why does the world need financial advisors?

Adam Reynolds  
APAC CEO  
Saxo

- Financial advisors and private wealth managers face an increasingly challenging external operating environment. What can advisors do to become even more client-focused and create a better financial future for their clients?
- Which focus does the industry have on helping clients understand their investing mentality and emotional state over time as an investor? What is the risk of a product-focus game?
- What does the modern advisor's digital toolset look like? Digital communication throughout the investment life cycle, central portfolio management and AI are some of the new ways to provide investment advice or managed investment.

10.00am

Panel Discussion - in partnership with InvestCloud

The future of the Advisor & Relationship Manager – Digitally Empowered

A key area of focus for the wealth industry today is RM operational efficiency. It is a challenge to service all clients which translates to all clients not getting consistent or the best treatment. It is also critical to ensure those engagements are relevant and personal.

One size does not fit all, and personalisation is not only about the product and investment offering, but also all about the location, timing, context, and matching ideas and their delivery to the individual client and the customer lifecycle. All these dots need to be connected to produce the personalised wealth management offering of tomorrow, and to engender the best conversations, next best action, better advice, more relevant products and solutions, and broadly enhance the provider/client relationships.

What does personalisation actually mean in the wealth management context? How can digital solutions help achieve and/or improve personalisation? How should digital solutions help the RMs and advisors to deliver a personalised service and proposition? What tools can help the RMs and advisors manage their time, their focus and their clients more effectively?

What solutions will help the banks and others to monitor their clients more effectively to ensure that personalisation is dynamic not static? What is content-based advisory, and how can that be achieved? And how can the wealth industry deliver personalisation at scale to the rapidly expanding and increasingly wealthy ranks of the mass affluent?

Our experts will deliberate many of these key issues around achieving and delivering personalisation in wealth management for the UHNW, HNW and mass affluent wealth markets of Asia.

Chair

Andrew Bresler  
Chief Revenue Officer & Deputy General Manager – APAC  
InvestCloud

Speaker

Akshay Prasad  
Managing Director, Head of Investment Products & Advisory Solutions, Asia-Pacific  
Nomura

Jitendra Tekchandani  
Executive Director, Customer Science & Segment, Wealth Management  
DBS Bank

Wei Mei Tan  
Global & Asia Head of Advisory  
HSBC Global Private Banking

10.45am Refreshment & Networking

11.15am Presentation  
Is the era of the new platform here?

Rafael Weber  
Head of Institutional Clients  
Swissquote

- Digital delivery of wealth management
- Transitioning wealth management into the digital era
- Distribution and connectivity is key

11.30am Panel Discussion - in partnership with Swissquote

Transforming and Scaling the Investment Offering

Delivery of a relevant, personalised and realistic investment product suite and investment advisory offering is essential for success in tomorrow's world of wealth management.

Our panel of experts will analyse where technology solutions can help the banks and other players improve their investment offerings, not only in terms of the product suite and platform but also the delivery of RM-led communication, advisory and DPM. They will discuss how the wealth industry needs to connect and interact with and leverage the skills and capabilities of the digital investment and custody platforms, as well as the private banks. They will also discuss how the wealth management organisations competing in the Asia region can best adopt and also assimilate these new technologies to enhance their investment propositions. And they will help identify what the next suite of solutions might be.

Chair

Rafael Weber  
Head of Institutional Clients  
Swissquote

Speaker

Ritesh Ganeriwal  
Head of Investment Advisory  
Syfe

Nicole Bodack  
Managing Director, C&IB, Wealth & Asset Management, APAC  
Accenture

Carolyn Leng  
Managing Director  
Bordier & Cie

12.00pm Panel Discussion

## Gazing into the Crystal Ball of Digital Solutions, FinTech Evolution and Technology Innovation

Nobody believes that digital transformation has achieved all of the goals the vendors and the wealth industry want. It is a work in progress from both sides. Accordingly, the Forum will also feature a short discussion in which our selected experts will gaze into the crystal ball to imagine what sort of digital innovation and solutions the wealth industry needs or will need or that are coming around the corner. They will look at this from the perspective of the evolution of the wealth industry in Asia, both onshore and offshore. And they will consider it from the viewpoint of what possible solutions will further enhance the wealth management proposition.

Chair

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

Speaker

Kasia Miaskiewicz  
Regional Head - Digital Wealth Management  
DBS Bank

Mark Wightman  
Asia-Pacific Wealth & Asset Management Consulting Leader  
EY

David Wilson  
Principal Director, Asia Wealth Management Lead  
Accenture

12.30pm

Presentation  
Future is Calling: How advisory will define wealth management in Asia

David Wilson  
Principal Director, Asia Wealth Management Lead  
Accenture

- Wealth firm ambitious growth targets
- Who is the Asian investor?
- Building blocks of advisory propositions
- Benefits to getting it right

12.45pm

Panel Discussion - in partnership with GTN Asia Financial Services

The rise of digital platforms for investment and wealth management

The past several years have seen an explosion in digital transformation in the global wealth management industry, and nowhere more so than with the rise of digital execution technologies and platforms. Remote working practices that have emerged since 2020 have supercharged the thrust towards 'smart' access to financial services of all types and fast-forwarded the wealth management industry's business models well beyond where they were expected to be today. At the core of these developments is the drive to provide seamless investment execution aligned with a far more personalised and relevant wealth management offering.

In this panel discussion, our chosen experts will delve deeply into the evolution of advanced digital execution technologies and platforms as the wealth industry in Asia

transforms itself and future focuses its business. They will debate the relative merits and state of progress at the private banks compared with external platforms.

They will discuss the key trends taking place in terms of platforms globally and especially in Asia and identify the biggest challenges and opportunities, especially as investors of all types demand greater access to a wider universe of asset classes and markets. They will also consider how the recent past since the pandemic has shaped the new normal, and they will lift the lid on what is coming next in the world of digital platforms that will further enhance execution and the broader wealth management offering in the region.

Additionally, they will look at all this from the viewpoint of investment and scalability, debating the approaches the wealth market players should take, for example building their platforms from the ground up, or partnering with external partners and Fintechs.

Chair

Julien Le Noble  
CEO  
GTN Asia Financial Services

Speaker

Philipp Piazz  
Partner  
Finaport

Steve Knabl  
Chief Operating Officer & Managing Partner  
Swiss-Asia Financial Services

Tuck Meng Yee  
Partner and Founder  
JRT Partners

1.15pm

Lunch & Networking

2.00pm

Forum Ends