Independent Wealth Management Forum 2016

8.40am	Registration
9.00am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
9.05am	Keynote Address Singapore as a hub for independent wealth in Asia Anthonia Hui Head of Singapore AlTi Tiedemann Global • Who is AIAM Singapore? • Value-add to members • The role of AIAM in the industry and with the regulators
9.20am	Panel Discussion How are we getting on? • What progress have we made as an industry? • What's still lacking in the development of the business? • What are the economics, both for independent firms and private banks? • This will probably be a tough year for many people – is this a good opportunity for you to grow your business? • Do we understand the compliance burden? Can we deal with it? Chair Michael Stanhope Founder & Chief Executive Officer Hubbis Speaker Urs Brutsch Managing Partner & Founder HP Wealth Management Anthonia Hui Head of Singapore AlTi Tiedemann Global Rohit Bhuta Philipp Piaz Partner

Finaport

10.05am Presentation

A new edge in investing in Asia

Jeff Medina
Senior Business Development Director
Asia Cornerstone Asset Management

- Why invest in aquaculture and agriculture businesses
- Investment policies and processes

10.15am Panel Discussion

Help, I'm so confused

- Where are we with FATCA?
- Where are we with CRS?
- Where are we with AEOI?
- What are the consequences for me and my clients?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Angelo Venardos
Chief Executive Officer
Family Heritage Trust

Shanker Iyer

Independent Financial Advisor

David Varley
Head of High Net Worth - Asia
AXA

Rashmi Lodhare
Associate Director, Tax & Compliance
Amicorp Group

Rolf Haudenschild
Head of High Net Worth - Asia
Maroon Analytics

Liam Collins
Partner
PwC

11.00am Refreshment & Networking

11.30am Presentation

FATCA - a practitioner's perspective

Jessica Cutrera
Founding Partner, Managing Director
EXS Capital

- What you need to do internally
- How best to prepare and work with your clients

11.40am

Presentation
Investing in preferred securities

Matthew Byer
Executive Director & Chief Operating Officer
Spectrum Asset Management

- What are preferred securities?
- Opportunities in preferred securities
- How big an impact is regulation having on preferred securities?
- How important is security structure and quality?
- How did preferred securities perform last year?
- Why should investors consider allocating to preferred securities?

11.50am

Presentation
Women: investing with a purpose - why women investors may need a different approach to reach their goals

Mark Nelligan
Chief Executive Officer
Pershing Singapore, a BNY Mellon company

What if you could have a more engaging discussion with your women clients about their investments and risk? There is a proven way to draw a clearer connection among the purpose for their investment, their investment choices and risk tolerance. It's called purpose-based engagement. Join Mark Nelligan, managing director Pershing Singapore Securities, as he discusses ways to build stronger relationships with women investors to help them achieve their financial goals.

12.00pm

Panel Discussion

Redefining and evolving the custody platform for this industry

- Is your client service, along with the technology and products offerings, improving? Or are private banks now too fearful and conservative to be of much help for you and your clients?
- What more can your custodians do for you to add value?
- What do you not want from your custodians?
- How do you choose the right custodian? What is the difference between a good one and bad one?
- Are there any other viable custody options that you should explore?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

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

Jessica Cutrera
Founding Partner, Managing Director
EXS Capital

Mark Nelligan
Chief Executive Officer
Pershing Singapore, a BNY Mellon company

Peter Williams
Structured Solutions Sales
Leonteq

12.45pm Lunch & Networking

1.35pm Panel Discussion

What’s the definition of an independent wealth manager?

- Do we really know what we are offering, and why we are different?
- What are the business models? And what is the difference between them?
- Does it matter which one I choose?
- How do I more clearly explain the value proposition to clients, and also private bankers?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Steve Davies
Founder, Chief Executive Officer
Javelin Wealth Management

Patricia Thomas
Chief Executive Officer & Founder, Asia
IRM Family Office

Filippo Fabbris
Portfolio Manager
Eightstone Oclaner

Yash Mishra
Managing Director, Head, Private Clients
Taurus Wealth Advisors

Rajini Kodialam
Managing Director
Focus Financial Partners

2.15pm	Presentation Residence and citizenship planning for Asian families - an overview Dominic Volek Group Head of Private Clients and Member of the Executive Committee Henley & Partners • Why do families relocate? • What should HNW families consider when carrying out residence and citizenship planning? • Current developments in residence and citizenship programmes
2.25pm	Refreshment & Networking
2.55pm	Presentation Will CRS really be - son of FATCA? Dr. Angelo M Venardos Director Philadelphia • Panic now or later? • Hong Kong - from EOI to AEOI • Singapore and Indonesia • BVI
3.05pm	Panel Discussion Private versus public markets - what does a client want today? • How do you add value to a client's portfolio? • Are they more interested today in absolute returns? • Which assets do my clients want? • What's the best way to source and deliver on this? • How do clients now view their risk? Chair Michael Stanhope Founder & Chief Executive Officer Hubbis Speaker Swan Khing Go Managing Partner Marc Faber Group Paul Gambles Director MBMG Group Suresh Withana Managing Director, Co-Head Asia Tikehau Capital

Federico Donato
Chief Executive Officer
FFA Asia

3.50pm Refreshment & Networking

4.00pm Panel Discussion

Doing what's best for your clients in a challenging and volatile year

- Fundamentally – has the world changed?
- China – what's next? Where can you find value?
- Where are we heading – recession? Downturn? Will things get any worse?
- Is volatility the 'new norm'?
- What does rising interest rates mean for clients?
- Oil – is there more downside to come?
- Where are the opportunities for our clients?
- How can clients build a high-quality, diversified portfolio?
- Risk management is key – but how can we get it right?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Paul Hodes
Wealth Management Head Asia & EMEA UK Wealth Management Head
Citi Private Bank

Steve Brice
Chief Investment Officer
Standard Chartered Private Bank

Leonardo Drago
Chief Investment Officer
AlTi Tiedemann Global

Ted Low

Low Risk Capital

Olivier Destandau
CIO
Eightstone Oclaner

5.00pm Forum Ends