Independent Wealth Management Forum 2017

8.40am	Registration
9.00am	Welcome Address Sascha Zehnter Managing Director, Head of External Asset Managers, South-east Asia Private Banking Division, and Head External Asset Managers, Asia Pacific Platform Credit Suisse
9.05am	Welcome Address Taking Singapore's independent community to the next level • How to drive greater industry collaboration • Creating a more inclusive Association • Fostering best practices in relation to regulation, digital, risk management Steve Knabl Chief Operating Officer & Managing Partner Swiss-Asia Financial Services
9.15am	Panel Discussion Survival of the fittest: thriving as independent wealth managers • What can we do as an industry to refine the value proposition? • How can firms build more of a franchise? • How should independent firms decide which type of business they should be in? • What's still missing in the client acquisition process? Chair Michael Stanhope Chief Executive Officer & Founder Hubbis Panel members Mandeep Nalwa Founder, Chief Executive Officer Taurus Wealth Advisors Yai Sukonthabhund Chief Executive Officer Crossbridge Capital Sanjay Guglani Managing Director Silverdale Capital Steve Davies Chief Executive Officer Javelin Wealth Management

Rolf Haudenschild
Co-Founder, Head of Compliance and Internal Audit Services
Ingenia Consultants

Tobias Bland
Chief Executive Officer
Enhanced Investment Products

Speaker

9.55am Keynote Presentation

Dedicated EAM expertise - growth through partnership

Sascha Zehnter
Managing Director, Head of External Asset Managers, South-east Asia Private Banking Division, and Head External Asset Managers, Asia Pacific Platform
Credit Suisse

- Observations and outlook on the EAM market development in Asia
- Mutual challenges for our industry
- Key success factors in servicing EAMs

10.15am Panel Discussion

Attracting new talents: building greater capabilities in independent firms

- How do the approaches of private bankers to acquiring clients differ from those of advisers at IAMs?
- How do we get more capable people to join independent firms?
- What types of bankers are best suited to this type of model?
- How do bankers capitalise on their existing client book when moving to an IAM?
- Are private bankers staying put within their institutions for the right reasons?
- Where will the next generation of independents come from?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Anthonia Hui
Chief Executive Officer
AL Wealth Partners

Philipp Piaz
Partner
Finaport

Anthony S. Casey
Executive Director, Wealth Management
Swiss Asia

Vineet K Vohra, CFA
Director & Practice Leader
Arete Financial Partners

David Varley

Chief High Net Worth Officer
Sun Life Hong Kong

Speaker

10.50am Refreshment & Networking

11.20am Panel Discussion

EAM Desk debate: should we bank on growth in independent wealth in Asia?

- What's the tangible opportunity that the IAM / MFO business represents for private banks?
- How much will scale of the IAM platform determine which banks will succeed?
- Do independent firms need large players? Or are more boutique banks better-placed to service them?
- How can banks create a competent platform qualified to serve IAMs / MFOs and their clients? What will be the differentiators in the offering going forward?
- Is there enough business for everyone?
- Some banks have either exited this business, or have never entered in the first place. Do they know something the others don't?
- What direction will EAM Desks take going forward?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Sascha Zehnter
Managing Director, Head of External Asset Managers, South-east Asia Private Banking Division, and Head External Asset Managers, Asia Pacific Platform
Credit Suisse

Thomas Jost
Executive Director, Head Intermediaries South East-Asia & Pacific
Bank Julius Baer

Olivier Parriaud
Head of Financial Intermediaries, Singapore
Indosuez Wealth Management

Sylvain Gysler
Executive Director, Head of Intermediaries & Multi Family Offices, Asia
VP Bank (Singapore) Ltd

Eduard von Kymmel
Head of VP Fund Solutions
VP Bank

Speaker

12.00pm Presentation
Building family legacy through citizenship and residence programmes

Dominic Volek
Group Head of Private Clients and Member of the Executive Committee
Henley & Partners

- What's driving investor migration for Asia's wealthy families?
- Key considerations for HNW families in relation to residence and citizenship planning
- Global trends and developments in investor migration

12.10pm

Presentation
HNWI and UHNWI clients - how a Variable Life Insurance can address their needs

Christopher Albrecht
Head of Representative Office, Hong Kong, Global Private Wealth
Swiss Life Global Solutions

- Diversification/choice in insurance solutions for HNW clients
- VUL value proposition to HNW clients and private banks
- Understanding why some HNW clients have avoided life insurance as a planning solution
- What does VUL bring to the market that currently is not available

12.20pm

Presentation
The case for gold

Jeffrey Rhodes
Director
Global Precious Metals

- Investing in gold
- The role of gold in portfolios

12.30pm

Presentation
RAIF, a Luxembourg alternative to offshore funds

Eduard von Kymmel
Chief Executive Officer, VP Fund Solutions - Luxembourg
VP Bank

- What is a RAIF?
- Advantages
- Asset classes
- Requirements
- Time to market & costs

12.40pm

Panel Discussion

What do clients think about independent wealth managers?

- What are wealthy families and UHNW clients looking for from their wealth managers today?
- What adds real value to these clients?
- Who is best-placed to deliver this?
- How do they select their advisers?

Speaker

12.55pm Lunch & Networking

1.40pm Panel Discussion

Singapore vs Hong Kong: how is the landscape evolving?

- What's the development of independent wealth management in each of Singapore and Hong Kong?
- What are the respective Associations in each city doing to help drive larger, more inclusive industries?
- What are regulators doing to facilitate independent wealth management? What more could they do?
- What are the main reasons to be positive for growth of independent firms in both cities?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Etienne Billaud
Senior Relationship Manager
SingAlliance

Patrick Busse
Director, Head of EAM South East Asia & International
Credit Suisse

Jessica Cutrera
Managing Director
The Capital Company

Riccardo Lehmann
Managing Director
Swiss Asia

Nigel Rivers
Founder and Chief Executive Officer
Capital Solutions

Speaker

2.25pm Presentation
Capital is NOT the problem

Julian Kwan
Co-Founder and CEO
InvestaX

- Challenges for real estate Investors in 2017
- What do HNW clients want in real estate investments?
- What real estate is shown to clients and why is this not really working?
- Previous obstacles to offering real estate products to clients
- The pie just got bigger

2.35pm Panel Discussion

Fintech: are IAMs investing the right way?

- How are we investing as an industry in fintech and digital tools?
- Are we making the most of this to drive growth for our businesses?
- Does anyone have a clear and differentiated digital strategy?
- What should be your priority when investing in technology?
- How can ensure you are well-placed to evolve and move past critical mass?
- How do you collaborate with fintechs to achieve your goals in terms of innovation and enhancing the client experience?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Steve Knabl
Chief Operating Officer, Managing Partner
Swiss Asia

Martin Young
Chief Executive Officer
Farringdon Asset Management

Julian Kwan
Chief Executive Officer
InvestaCrowd

Frank T. Troise
Managing Member
SoHo Capital LLC

Will Lawton
Co-Founder
Eigencat

Speaker

3.20pm Refreshment & Networking

3.45pm Panel Discussion

Year 2020: Asia’s independent wealth management industry

- Where will Asia’s independent wealth management industry be in 2020?
- What are the structural opportunities to move the business forward to the next level?
- Is it realistic to grow organically and reach the desired scale?
- How do we even define the right size?
- What are the opportunities to collaborate in a more meaningful, coordinated and tangible way?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Urs Brutsch

Managing Partner & Founder
HP Wealth Management

Rohit Bhuta
Chief Executive Officer
Crossinvest

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

Sascha Zehnter
Managing Director, Head of External Asset Managers, South-east Asia Private Banking Division, and Head External Asset Managers, Asia Pacific Platform
Credit Suisse

Ernest Ong
Senior Consultant
Mercer

Speaker

4.25pm	Panel Discussion

Looking ahead: what will affect investment portfolios in 2017?

- 2017 is supposed to be an equities year – will it actually happen?
- Will this be another year of turbulent markets? A replay of 2016?
- How will investors generate performance in 2017?
- How do clients think today? And how do you manage their expectations?
- What are the biggest risks for 2017?
- How will geo-political risks impact the landscape?

Chair

Andrew Hendry
Managing Director, Asia
Westoun Advisors

Panel members

Juerg Kiener
Managing Director & Chief Investment Officer
Swiss Asia Capital

Vinit Sarangdhar
Managing Director
Alpha Quest

Noli de Pala
Chief Investment Officer
TriLake Partners

Carlo Rossi
Managing Director
Trendlab

Speaker

5.15pm	Forum Ends