Independent Wealth Management Forum 2020

8.20am	Registration
8.45am	Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

8.50am Panel Discussion

Custody and Execution – Revolution or Evolution? Who will win the battle of the platforms?

- Can traditional Private Bank custody platforms survive?
- What's different? What's Your USP?
- How are platforms used to access investment products? Fees, costs and transparency?
- What is the User Experience?
- Functionality? Speed and efficiency?
- Investment coverage and market access?
- On boarding?
- What revenue can you capture?
- How is access to managed investments changing?
- End client review and analytics?
- Access to APPs and add ons?
- Are clients looking for comprehensive service from a single service provider?
- Empowering distributors and Fund Houses with analytics, market insights, trends
- Regulatory data – what does that mean?

Chair

Dr. Silvio Struebi
Partner
Simon-Kucher Global Strategy Consultancy

Speaker

Adam Reynolds
APAC CEO
Saxo

Damian Hitchen
Chief Executive Officer, Singapore
Swissquote

David Friedland
Managing Director, Asia Pacific
Interactive Brokers

David Perez de Albeniz
Head of Asia
Allfunds

Will Lawton
Independent
Acalution

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

Evrard Bordier
CEO and Managing Partner
Bordier & Cie

9.35am

Presentation
Wealth Planning Today

Peter Triggs
Partner
1291 Group

- History
- What has been happening in Wealth Planning?
- What do clients need today?

9.50am

Head - to - Head Q & A

Investment Migration: Trends and Developments for HNWIs

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

- Why is the Investment Migration industry booming?
- How can Henley & Partners help your HNWI clients?
- What are the pitfalls that HNWIs should be aware concerning investment migration?

10.00am

Presentation
Cyprus Island of Opportunities

Ioannis Ioannikiou
Legal Advisor
Casamont Cyprus

- Cyprus Investment Program
- Benefits of Cyprus when structuring your wealth
- Cyprus investment opportunities

10.10am

Head - to - Head Q & A

How is technology Impacting the delivery of Wealth Management?

Damian Hitchen
Chief Executive Officer, Singapore
Swissquote

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

10.20am

Presentation
Interactive Brokers

David Friedland
Managing Director, Asia Pacific
Interactive Brokers

10.30am

Presentation
Future-proof your wealth manager business with a modern platform-based model

Ivan Chang
Regional Manager, Institutional Business
Saxo

Consolidation and automation are key themes shaping the future of private wealth management, with digitisation offering potential for new services and business models.

- Developing technology-driven strategies for serving mass affluent and HNW individuals
- Helping wealth managers and financial advisors transform the customer experience in a digitally scalable way
- Cases of collaboration across the eco-system to help firms provide financial planning and advisory services with greater efficiency, flexibility and scalability.

10.40am

Presentation
Do-It-Yourself Wealth Management: Using Technology to Access Professionally Managed Global Diversified Portfolios Cheaply and Efficiently

Harold Kim
Founder and Chief Executive Officer
Neo Risk Investment Advisors

- Combination of managed account technology and ETFs allow individual investors to have global, diversified portfolios managed professionally in their own accounts with full transparency in an efficient and low-cost manner.
- We provide some examples of this do-it-yourself wealth management.

10.50am

Presentation

Physical Gold – making a shiny and solid contribution to any portfolio

Maxime Fages
Head of Strategy & Digital Assets
Global Precious Metals

- Privacy risk-exposure increases with wealth
- The downside of global financial transparency affecting personal wealth
- How structuring personal wealth around gold can offer significant disastrous risk remediation

11.00am Presentation
Choosing the right investment product for the current market environment

Peter Muehlsiegl
Director, Sales Structured Solutions
Leonteq

- What is popular with investors at the moment?
- How investment products can complement your clients´ portfolios
- Keeping the flexibility

11.10am Refreshment & Networking

11.30am Presentation
What are Life Settlements?

Brad Thompson
President
Fidelity Settlements

- Non-correlated Alternative Asset Class
- Background
- Current Market Outlook

11.40am Panel Discussion

Portfolio construction and model portfolios – doing it effectively and at a rational cost.

- Trends in portfolio construction – is the traditional way becoming obsolete?
- How do you manage cost, expected returns and implementation?
- Advisory – what does that mean and how can you charge for it?
- Long term investing – does anyone really do it?
- The ability to build bespoke portfolios – how should it be done today?

- Monitoring and rebalancing – how can you do it better?
- What's the role of ETFs and Passive funds?
- How can technology and AI help?
- Execution - Fees, costs and transparency. What's changing?
- How can you differentiate yourself?

Chair

Mark Smallwood
CEO, Rapier Consulting. And Engagement & Consultant Partner,
Hubbis

Speaker

Haren Shah
Managing Director, Head of Investments
Taurus Wealth Advisors

Joyce Woo
Founder & Chief Executive Officer
Jachin Capital

Noli de Pala
Chief Investment Officer
TriLake Partners

Harold Kim
Founder and Chief Executive Officer
Neo Risk Investment Advisors

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

Johan Jooste
Managing Director

12.20pm Panel Discussion

Investment products that are interesting and relevant in 2020

- What are the main investment themes and the products that will be most effective in 2020?
- Certain equities were up a lot in 2019. Time to sell?
- Long-term outperformance in the US. Time to shift to Emerging Markets?
- Credit spreads are very tight today. Will they widen?
- Gold – will it shine brightly in 2020?
- How will you generate income in 2020? What is your client's expectation on yield today?
- Managing and understanding risk — how do you estimate risk, and how does it impact your investment process?
- How do you think Asian equity market performance will be in 2020?
- Multi asset strategies – still as interesting in 2020?
- Is there an increasing interest in ESG?
- What's the outlook for emerging markets? Asia?
- Is the US market over heated? Are we heading to the next financial crisis in 2020?
- Is Asia warming to index and ETF products?
- What's the interest of private clients today in;
    - Alternatives

    - Private equity
    - Hedge funds
    - Infrastructure
    - Property
- Whats the outlook for China in 2020? Good time to invest? What sectors are best?
- How can you managing risk in Asian equities to improve investment performance?
- What's your view on global equity markets?
- How do you think real assets benefit a broader diversified portfolio?

Chair

Mark Smallwood
CEO, Rapier Consulting. And Engagement & Consultant Partner,
Hubbis

Speaker

Tony Wong
Head of Intermediary Sales
CSOP Asset Management

Robert Cheung
Chief Executive Officer
Assured Asset Management

Deep Singh
Chief Capital Officer, Executive Director
EFA Group

Aleksey Mironenko
Partner & Chief Distribution Officer
Premia Partners

Antoine Bracq
Executive Director, Investments
Lighthouse Canton

1.00pm Presentation
Investment funds: A tailor-made solution to meet the requirements of independent asset managers, investment advisors and trustees

Wolfdieter Schnee
Head of Fund Consulting, VP Fund Solutions
VP Bank

- How can current regulatory, operational, risk and tax challenges can be overcome by using collective investment schemes?
- Illustration of business cases for using a fund structure
- Functioning, requirements, timeline and costs

1.10pm Lunch & Networking

1.50pm Room A – Workshop

How is technology impacting the delivery of Wealth Management?

- What are the main evolutions being driven by technology?
- What are the client demands re; technology? What are the expectations?
- Is the industry, and its main players, adopting and adapting its delivery of services?

Damian Hitchen
Chief Executive Officer, Singapore
Swissquote

1.50pm Room B – Workshop

Investment Migration: Trends and Developments for HNWIs

- Introduction to the Investment Migration Industry
- Citizenship-by-Investment: Travel and Settlement Freedom for HNWIs
- The world's leading Residence-by-Investment Programs

Scott Moore, IMCM
Managing Director
Henley & Partners

2.30pm Room B – Workshop

Life Settlements – A Non-correlated Alternative Asset Class

- Background of this Growing Asset Class
- Outsized performance compared to other fixed income products
- How to Invest in Life Settlements

Brad Thompson
President
Fidelity Settlements

2.30pm Panel Discussion

Maximising the discussion around Wealth Solutions and NEXT GEN

- Clients are getting OLD – what do they need before it's too late?
- How to start the wealth solutions discussion and why is this increasingly important?
- Is this a bigger opportunity for a MFO than a Private Bank?
- Do NEXT GEN clients show any interest in engaging traditional wealth managers?
- Suitability / tax / transparency – what are all the challenges we must consider?
- What developments are we seeing in HNW Insurance?
- The UL conversation is not as easy as it was – how will it evolve?
- More product choice is confusing – how can we present the right opportunities to clients today?
- How have IFCs evolved and what does the future now holds?

Chair

Mark Smallwood
CEO, Rapier Consulting. And Engagement & Consultant Partner, Hubbis

Speaker

Alex Borissov
Partner
Finaport

Tuck Meng Yee
Partner and Founder
JRT Partners

Steve Lawless
Founding Partner
Salus

Irene Lee
Director, Business Development Asia
Alpadis Group

An Kelles
Director GCC
Jersey Finance

3.10pm Refreshment & Networking

3.30pm Presentation
Life Insurance: UK Property exposure & Inheritance Tax - A UK solution in Asia

Steve Lawless
Founding Partner
Salus

- Life Insurance is an incredibly powerful tool to create liquid assets when they are most needed.
- The UK authorities created the 40% problem for overseas owners of UK property. The UK Insurance market offers an excellent, and particularly appropriate solution.
- While the Asia insurance market offering has been viewed by many as too narrow historically; Salus can offer a different product set to this specific solution that is both customer, and particularly IAM friendly.

3.40pm Panel Discussion

Accessing Greater China clients – what's the developing opportunity?

- Are HNW / UHNW clients increasingly interested in booking their assets in Singapore?
- Given the persistent issues in Hong Kong – will this engagement accelerate?
- Do you need an office in both centres? Or is Singapore now the clear winner?

- What's Singapore got that's particularly appealing?
- How can Singapore help with wealth structuring and tax optimisation?
- How can you make the most of this opportunity?

Chair

Mark Smallwood
CEO, Rapier Consulting. And Engagement & Consultant Partner,
Hubbis

Speaker

Benn Ng
Managing Director, Relationship Management
Raffles Family Office

Woon Hum Tan
Partner, Head of Trust, Asset & Wealth Management Practice
Shook Lin & Bok

4.10pm	Presentation VCC: Is it really a game changer?

Marilyn See
Director – Business Development
Trident Trust

- Comparison of VCC with other fund vehicles
- When will VCC be a suitable consideration?
- What's next for the VCC?

4.20pm	Presentation
4.30pm	Presentation Update – Association of Independent Asset Managers Singapore (AIAM)

Philipp Piaz
Partner
Finaport

- What progress has the Association made in 2019?
- Key priorities for the year ahead?
- What does the Association do for independent firms?

4.40pm	Panel Discussion

What does it take to set up an EAM / MFO?

- What has to be done on day 1?
- What's the cost?
- Office space?
- You think you're entrepreneurial – but are you really?
- What staff do you need to employ and when?
- What can you outsource and what must be in house?
- Investments / advice / DPM – whats in the mix? how can you get it right?
- What's the balance between the investment side and non-investment side?
- How do you keep the regulator happy?
- Issues? And how do you avoid them?
- What's a realistic expectation for growth?
- External counsel and professional services – How do you find cost effect and value-added advisers?
- Regulation and compliance – what's necessary? What licence do you need?
- External reporting – what's needed and how to do it?
- Is heading out with one big client to set up by yourself a huge risk?
- How do you build the business in a cost-effective way?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Philipp Piaz
Partner
Finaport

Urs Brutsch
Managing Partner & Founder
HP Wealth Management

Rohit Bhuta

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

Sin Yee Koh
Director
Duff & Phelps

Martin Young
Chief Executive Officer
Farringdon Asset Management

Gary Dugan
Chief Executive Officer
DALMA CAPITAL - Global CEO Office

5.30pm Forum Ends