INDEPENDENT WEALTH MANAGEMENT FORUM 2023

8.30am	Registration
8.55am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
9.00am	Panel Discussion

How is the independent wealth movement progressing in Singapore?

- What's the role of the Association of Independent Wealth Managers (AIWM)?
- How are the specific requirements of clients changing? Why do they use an EAM / MFO? Any specific expectations for clients from China? Or India?
- The cost of everything is increasing – what are the consequences of this?
- How has the business continued to evolve elsewhere – like Switzerland?
- How are you dealing with the increase in competition?
- What are the business models that are relevant to this segment?
- MFO vs SFO - How does a client choose?
- Should there be higher hurdles to setting up an EAM/MFO?
- How can you find the right type of RMs to join the team? Why should they join and EAM?
- Do you need to be an entrepreneur to start an MFO? Do RMs from private banks really understand what it is like working at a MFO? Are they prepared to roll up their sleeves and do the hard work?

Chair

Rafael Weber
Head of Institutional Clients
Swissquote

Speaker

Jolene Tan
Executive Director - Managing Partner
SingAlliance

Jeffrey Wong
COO
Hywin International

Shilpi Chowdhary
Chief Executive Officer, Managing Director
Lighthouse Canton

Arthur Fong
CEO
One Heritage Capital Management

9.30am Presentation
WealthTech Advances and Services for the Independent Wealth Manager

Philipp Bisang

CEO
Expersoft Systems

- How banks can help the IWM?
- How software providers can help the IWM?
- Expersoft's view

9.45am Panel Discussion

Curating and Delivering Advice

- How do you explain your wealth management proposition in comparison to a private bank?
- What must you offer to deliver a genuinely client-first advisory offering?
- How would you explain your value proposition? How can you differentiate yourself?
- Do you need an investment adviser or CIO to run a meaningful and effective boutique independent wealth management firm?
- Where do you get the best inputs when considering the advice that you give to clients?
- Who do you partner with for success? Platforms / Investments / Tech / Professional Services
- How do you build a good culture? How do you grow the business?

Chair

Andrew Hendry
CEO Asia
Janus Henderson Investors

Speaker

Carolyn Leng
Managing Director
Bordier & Cie

Philipp Piaz
Partner
Finaport

Catalin Burlacu
Portfolio Manager, Managing Director
New Dimensions Capital

Lucie Hulme
Chief Executive Officer & Partner
TriLake Partners

10.15am Presentation
Navigating Unprecedented Times with Private Credit

David Z Wang
Co-Founder and Group CEO
Helicap

- Adapting PC Strategies for Uncertain Times: Mitigating Risks and Seizing Opportunities
- What to Expect for the Future of PC: Trends, Challenges, and Outlook

10.30am Panel Discussion

Independent Wealth Mangers – Defining and Refining the Proposition

- What is the nature of a sustainable platform? And the challenges of creating a successful and profitable business?
- How do you manage the increasing cost of IT, security and regulation?
- Are the compliance standards higher or lower at Independent Wealth Managers? Do IAMs need a separate set of regulations in Singapore?
- Are there consistent standards in this industry? Why is everyone's interpretation of rules and compliance different? How do you do things pragmatically and efficiently?
- How do you manage differences in standards and expectations in different jurisdictions?
- Why don't IAMs take the same qualification as private bankers?
- Are there too many duplications of effort – between the IAM and custodian bank?
- Why don't we introduce a portable KYC procedure in Singapore?

Chair

Adam Reynolds
APAC CEO
Saxo

Speaker

Oliver Balmelli
Head of Independent Asset Managers and International Private Banking
EFG International

Mauricio Ribeiro
Partner
MOIQ Capital

Michel Della Libera
Founder and Chief Executive Officer
OneRock Investments

Urs-Peter Oehen
Founder, Chairman
Expersoft Systems

11.00am Refreshment & Networking

11.30am Presentation
Global Life Sciences: resilience and growth potential as recession looms

Andrew Hendry
CEO Asia
Janus Henderson Investors

- Is growth still possible in the current market environment?
- What is the role of thematics in a core portfolio?
- How can you exploit private market opportunities in Biotech?

11.45am Presentation
Demystifying the Technology Transformation Gap in Wealth Management

Evrard Bordier

CEO and Managing Partner
Bordier & Cie

- What are AI and Digital Wealth Management?
- Major innovations wealth managers should not ignore?
- The role of Generative AI in wealth management – where are we now?
- Managing challenges and integration in the transformation process
- Managing people talent in this new era
- How can Private Banks use this technology to differentiate themselves?

12.00pm

Presentation
Creating alpha with data-driven investments in private credit

Radek Jezbera
Co-Founder & Chief Executive Officer
Kilde

- Data-driven investing is no longer exclusive to public markets. Using the power of big data and artificial intelligence, investors can now reap large yields from private assets such as consumer and MSMEs loans.
- In fact, in a year fraught with uncertainty - 2022 - we were able to achieve an 11.6% annual return for our private credit notes along with 160% collateral cash coverage.
- By leveraging artificial intelligence software that mines loan repayment data for small loans over short tenures, it is possible to establish a reliable cash flow baseline used as collateral; creating lucrative fixed income opportunities previously only available to banks.

12.15pm

Presentation
China reopening and framing for 2023 opportunities in China and ASEAN

Laura Lui
Partner & Co-Chief Investment Officer
Premia Partners

- Where are we in China's reopening trajectory, from business fundamentals to evolution of investor flows and allocations?
- Tactical and strategic bets – why are policy supported sector leaders well placed to outperform?
- Investment case and tailwinds supporting emerging ASEAN as the natural beneficiaries of China recovery and source of uncorrelated returns.

12.30pm

Presentation
Why Pay More?

Ivan Chang
Regional Manager, Institutional Business
Saxo

- The tough task for wealth managers in choosing financial institutions and service providers
- How do you get the most value for your customers and your organisation without breaking the bank?

12.45pm	Presentation Digitalising the investment and wealth management lifecycle Julien Le Noble CEO GTN Asia Financial Services • Evolution of digital execution and investment platforms • The execution and wealth management toolkit • Building or partnering with external partners and Fintechs
1.00pm	Lunch & Networking
2.00pm	Workshop Introduction to Swissquote's digital Custody and Execution Platform for EAMs, MFOs and Funds Rafael Weber Head of Institutional Clients Swissquote • Introduction of Swissquote Group • Why Swissquote is the better option for EAMs and (U)HWNIs compared to traditional private banks? • Demo of Swissquote: How can our platform help to run an EAM/MFO/SFO more efficiently?
2.40pm	Workshop Transforming a Family Office to Reimagine the Value it Delivers Bryan Henning SVP, Head of International Eton Solutions • Setting up a family office to deliver scalable advantage for tomorrow • Using technology to create operational leverage and efficiencies • Digitalising governance functions within the Family Office and across family members and key advisors
3.10pm	Workshop Behavioural Finance – Gorilla in the Room Andrew Hendry CEO Asia Janus Henderson Investors • How do your clients really make investment decisions? • Do behavioural biases skew investment decisions?

- Learn about selection attention biases, overconfidence, and recency

3.50pm Refreshment & Networking

4.10pm Panel Discussion

Reinventing Training and Professional Development in Wealth Management

- How is the training and professional development framework in Singapore evolving?
- How can we improve training and make is more relevant and impactful?
- How can we use training to attract and retain the right talent? And differentiate the firm and create a better client experience?
- Should there be a professional framework / requirement for independent wealth managers like MFOs and EAMs?
- What are the key topics and areas of focus for 2023 and beyond?
- How can training be most effective for onboarding, transition and career development?
- Making it stick – from learning to implementation. Strategies for success.
- How does HR and Compliance fit into this equation?
- How do you decide whether training has been a successful outcome - for the organisation, the RM and the client?
- Do we need to focus more on education for clients?

Chair

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

Speaker

David MacDonald
Head of Business Development - Singapore
The Sovereign Group

Arjan de Boer
Head of Markets, Investments & Structuring, Asia
Indosuez Wealth Management

Chiara Bartoletti
Chief Operating Officer
Eightstone

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Bassam Salem

5.00pm Forum Ends