Indian Family Wealth Forum 2016

8.40am	Registration
9.00am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
9.05am	Panel Discussion Addressing the challenges in managing family wealth • What challenges to both new and old wealth face in preserving and protecting their business and personal assets? • What are the issues to consider when investing for growth? • What advice do families need in terms of re-generating wealth? • Being philanthropic – what are some of the innovative and sustainable approaches to giving in India? • Who are the right professionals and advisers for families to engage? And how should they choose between them? Chair Michael Stanhope Founder & Chief Executive Officer Hubbis Speaker Arpita Vinay Managing Director and Co-Head Centrum Wealth Munish Randev Founder & CEO Cervin Family Office Tarun Birani Founder and Chief Executive Officer TBNG Capital Advisors
9.50am	Presentation Current trends and new horizons Himadri Chatterjee Director, Wealth Management Services 360 ONE
10.00am	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

10.10am Refreshment & Networking

10.40am Panel Discussion

Shielding Indian clients from the global spotlight on transparency

- FATCA, CRS and AEOI – what does this mean for the advice you need to give to your clients?
- What do you need to do internally?
- Panic now or later?
- What should we do differently to protect wealth – and with the least cost?
- What do wealth managers need to know to guide clients through the current environment
- How do you help citizenship and alternative residency planning for wealthy families?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Kanwar Vivek
Senior President - Head Wealth Management & YES First Branch Banking
YES Bank

Angelo Venardos
Chief Executive Officer
Family Heritage Trust

Elise Donovan
Director
BVI House Asia

11.20am Head - to - Head Q & A

A leading IFC - Jersey's perspective

Gary Hales
Business Development Director - GCC and India
Jersey Finance

- What has Jersey learnt over the years?
- What can India learn from the various challenges and successes of Jersey?
- What does being an 'early adopter' of new regulation mean in reality?
- How to ensure the right quality and substance of service providers
- What is required in terms of infrastructure to get to this point?

11.30am Presentation

Challenges in advising business families

Shanker Iyer

Independent Financial Advisor

- Common challenges faced by business families
- The demands placed on advisers to meet these

11.40am Panel Discussion

Making business succession planning smoother

- What are the right structures to help promoters pass on and/or sell their businesses?
- How do you help manage the process better?
- How do you steer family wealth with a trans-generational vision?
- What is the best way to manage conflicts?
- How can you embed the diverse needs of all family members to create a sustainable platform for future generations?
- How can you best groom the next generation?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Shweta Shah
Head Wealth Structuring & Estate Planning
Nuvama Private

Poonam Mirchandani
Director-Wealth Advisory , Wealth & Investment Management
Barclays

Gautami Gavankar
CEO - Estate Planning & Trusteeship and Head - Family Office
Kotak Mahindra Group

Sunil Iyer
Managing Director, Singapore
IQ-EQ

Ajay Agashe
Executive Director
EY

Lynda O'Mahoney
Head of Business Development - Middle East
Capita Asset Services

12.30pm Lunch & Networking

1.20pm Panel Discussion

Helping families manage their personal wealth

- How do you add value to a client's personal portfolio?
- Which types of assets and transactions do clients want access to?
- How are clients looking to manage their risk exposure?
- Should the attitude of Indian families towards investments change in a volatile world characterised by less growth?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Anupam Guha
Head of Private Wealth Management & Equity Advisory Group
ICICI Securities

Manish Singla
Executive Director
Client Associates

Benaifer Malandkar
Chief Investment Officer
Raay Global Investments

2.10pm Presentation
Equities as an asset class for wealth creation

Aashish Somaiyaa
Chief Executive Officer
Motilal Oswal Asset Management

- The Motilal Oswal Asset Management investment philosophy
- The investment process

2.20pm Refreshment & Networking

2.50pm Panel Discussion

Deploying capital in a smart and sustainable way

- What advice do family offices want and expect?
- What are business promoters doing with the funds they raise from liquidity events?
- For entrepreneurs with short-term money – how should they deploy this?
- How should they re-invest to generate new wealth over the long term?
- What are some of the products and other solutions to help clients meet their objectives?

Chair

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Founder & Chief Executive Officer

Hubbis

Speaker

Nipun Mehta
Founder and Chief Executive Officer
BlueOcean Capital Advisors

Aditi Shrivastava
Head Intellecap Impact Investment Network
Intellecap

Dhruv Mehta
Chairman Foundation of Independent Financial Advisors (FIFA)
Foundation of Independent Financial Advisors (FIFA)

3.40pm Panel Discussion

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

- Fundamentally – has the world changed?
- Global issues – what's the impact on India?
- Is volatility the 'new norm'?
- Where are we heading – recession? Downturn? Will things get any worse?
- Where are the opportunities for our clients?
- How can clients build a high-quality, diversified portfolio?
- Alternative investment funds – an alpha opportunity?
- What's the role of real estate in today's markets?
- Oil – is there more downside to come?
- Risk management is key – but how can we get it right?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Nishant Agarwal
Managing Partner and Head - Family Office
ASK Wealth Advisors

Sunil Sharma
Chief Investment Officer
Sanctum Wealth

Umang Papneja
Senior Managing Partner, Chief Investment Officer
360 ONE

Vinay Bajpai
Managing Director - Coverage & Advice
Deutsche Bank Wealth Management

Gaurav Arora
Chief Investment Officer
Religare Private Wealth

Sharad Mittal

Director and Head of Real Estate
Motilal Oswal Asset Management

4.40pm Forum Ends