Indian Wealth Management Forum 2019

8.40am	Registration
8.50am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
8.55am	Panel Discussion

Private wealth management - a time of dramatic change

- What can you do to improve your value proposition?
- Is your firm attractive enough for the new wealth creators and next generation of clients?
- What does the current revenue mix of wealth managers in India look like? How is it changing?
- What changes are we seeing in client expectations and behaviour?
- Where will the continued growth come from and what are your priorities?
- What does the word ‘advice’ really mean?
- Are clients not thinking realistically abut risk and reward?
- How can you get the right people and proposition in front of the right clients?
- Revenue margins per clients will decline in the future. Is digital a way to stop revenue erosion and are you effective at monetising new digital services?
- What is the future role of the RM when banks get digital? Is the human touch less important in the future?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Anshu Kapoor
President & Head
Nuvama Asset Management

Abhijit Bhave
Managing Director and CEO
Karvy Private Wealth

Feroze Azeez
Deputy CEO
Anand Rathi Wealth

Satheesh Krishnamurthy
EVP & Head - Private, Premium Banking & Third Party Products
Axis Bank

Himanshu Kohli
Founder Partner
Client Associates

9.40am	Presentation Investing in the Current Market Environment Ankur Thakore Chief Distribution Officer L&T Investment Management • Current market environment • What's worrying fixed income market? • What should one do in these times?
9.50am	Head - to - Head Q & A Investment Migration: Trends and Developments for HNWIs Dominic Volek Group Head of Private Clients Henley & Partners • Why is the Investment Migration industry booming? • Why does Henley & Partners attend the Hubbis events? • Where do our clients come from? • Why do PBs/IAMs etc work with us? • How can Henley & Partners help your HNWI clients? • What are the pitfalls that HNWIs should be aware of concerning investment migration?
10.00am	Presentation Transforming Wealth Management for the Future Abhra Roy Senior Product Line Manager and Head, Finacle Wealth Management Infosys Finacle Atul Singh Founder & Chief Executive Officer Validus Wealth • Redefining wealth management for 2019 and beyond • Future Proofing your Business with a Truly Digital Platform
10.15am	Presentation Wealth Management as a subscription service Anshu Kapoor President & Head Nuvama Asset Management • The future of wealth management, driven by client needs and regulatory impact • Shift in wealth management business model

10.25am Panel Discussion

Platforms and Technology - the future of private wealth and asset management?

- What does it mean today to 'add value' to a client?
- What do you need from your investment platform? How is that changing?
- What digital expectations do clients have?
- Transparency, Margins, Costs and Fees – what's changing?
- How must we tweak the investment engine? Can it be automated? How can we improve efficiency?
- How do we deliver 'funds' and investment products and 'advice' to our clients efficiently?
- What does the word 'platform' mean to you?
- How can you help wealth and asset managers with their fund selection, diversification and asset allocation?
- What's the role of AI?

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Speaker

Kunal Bajaj
Head of Digital Wealth Management
MobiKwik

Sharad Singh
Chief Executive Officer
Valuefy

Damian Hitchen
Chief Executive Officer, Singapore
Swissquote

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

Rahul Gaitonde
COO
Cube Wealth

Anand Moorthy
Founder & CEO
PropsAMC

Shobhit Mathur
Senior Director & Head - Advisory
Kotak Investment Advisors

11.10am Presentation
RM Office - 2020 Advantage

Stanzin Tsesdup
Assistant Vice President, Global Consumer Banking
Intellect Design Arena

- Possibility to Increase RMs productivity by 20%
- Possibility to reduce operational cost by 20%

- Let your system take care of compliance - 3D Compliance
- Leveraging Digital - Enhanced Outreach and contextualized experience
- Actionable insights to direct the destiny of the business

11.20am Refreshment & Networking

11.45am Presentation
2019 - Same same

Philip Story
Senior Executive Officer and Head of Distribution EMEA
ITA

- Did my predictions for last year come true?
- Is 2019 just going to be the same as 2018?
  - India opportunity
  - Global issues creating opportunities
- How can you help your clients via offshore, hard currency, platforms?

11.55am Presentation
Trends in investment pattern of High Networth Individuals (HNIs)

G Pradeepkumar
Chief Executive Officer
Union Asset Management

- HNIs becoming more influential in the mutual fund industry.
- There is visible change in their preference between equity and debt.
- Long Term Capital gains tax on debt seems to be having an impact on the holding pattern.

12.05pm Presentation
Cyprus Revitalised: How to Capitalize on the Island's reform?

Ioannis Ioannikiou
Legal Advisor
Casamont Cyprus

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

12.15pm Presentation
HNW Insurance & Cricket – The "pitch" has changed……here's how you win

David Varley
Chief Partnership Officer - Brokerage, International HuBS
Sun Life

- What's happening in the HNW Market?
- How HNW Brokers, Bankers, EAM can adapt to win in the new HNW Insurance Market?
- What are the new Products and Trends in HNW Market?
- Why should Bankers and Financial Advisers be interested in HNW Insurance?

12.25pm Panel Discussion

Curating the right solution for clients – what's thrown in the mix today?

- The Future Survival of Private Wealth Management: Mastering the Art of Gaining and Retaining Millennials. Are we REALLY ready for the transfer of wealth to the next generation?
- What are the biggest trends in wealth structuring and planning today?
- What are the most common concerns of HNW & UHNW clients?
- Finding the best advisory services and solutions – how do you maximise partnership with the right specialists?
- What specific trends are we seeing from Indian clients?
- How is the importance of International Financial Centre's changing?

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Speaker

T P Ostwal
Managing Partner
T. P. Ostwal & Associates LLP

Ashvini Chopra
Senior Vice President
Times Group

Shweta Shah
Head Wealth Structuring & Estate Planning
Nuvama Private

Sneha Makhija
Head of Wealth Planning
Sanctum Wealth

Neha Pathak
Senior Group Vice President, Head of Trust & Estate Planning
Motilal Oswal Private Wealth

Rishabh Shroff
Partner & Co-Head, Private Client Practice
Cyril Amarchand Mangaldas

Tariq Aboobaker
Managing Director - Trustees
Amicorp Group

1.10pm Lunch & Networking

1.50pm Room A – Workshop

	Global Citizens: Trends and Developments in Investment Migration • Introduction to the Investment Migration Industry • Citizenship-by-Investment: Travel and Settlement Freedom for HNWIs • The world's leading Residence-by-Investment Programs Dominic Volek Group Head of Private Clients Henley & Partners Nirbhay Handa Group Head of Business Development Henley & Partners
1.50pm	Room B – Workshop Rearranging the banking landscape • Evolution of change and the challenge to existing players; Who, how and when? • How is technology evolving the industry? • Example of digital platforms in wealth management / private banking Damian Hitchen Chief Executive Officer, Singapore Swissquote
2.30pm	Room A – Workshop Accelerating Digital Wealth Management and Bancassurance • Empowered, Digital Financial Advisory • Digital journeys for Advisors and Clients • A Digital Core Wealth Management engine for mid and back office operations Abhra Roy Senior Product Line Manager and Head, Finacle Wealth Management Infosys Finacle
2.30pm	Room B – Workshop Fair Value: The Google Maps of Investing • Fallacy of the Index PE multiple • Fair Value approach to investing. • Google maps vs fair value approach Vinay Paharia Chief Investment Officer Union Asset Management
3.10pm	Refreshment & Networking
3.30pm	Panel Discussion Reinventing wealth management for Women • Does this industry offer great prospects for women? • Do Women make much better wealth managers and asset managers? • How do we attract more women into this business? • Are women in India becoming a financial force with impact?

- Do women have unique investing needs and preferences?
- Are current advisory models working for women?

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Speaker

Swetha Manot
Associate Director – Private Wealth Management
Anand Rathi Wealth

Lakshmi Iyer
Chief Investment Officer (Debt) & Head Products
Kotak Mahindra Asset Management

Ruchi Sankhe
Managing Director, Origination and Client Coverage
Waterfield Advisors

Nithya Easwaran
Managing Director
Multiples Alternate Asset Management

4.15pm Panel Discussion

Building the skills you need for success in wealth management

- How can learning and professional development help you add value and differentiate your offering?
- Why is improving skills so important today?
- Trusted adviser – what does that even mean?
- What's critical to ensure business ownership and input in developing the best learning and development programmes?
- What must we do to improve competency assessment for leaders and advisers today?
- What works and what doesn't?
- Does anyone take learning and competency seriously in India?
- Why have we not set a higher bar?
- What's the role of the regulator?

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Speaker

Ashish Gumashta
Managing Director & CEO, Julius Baer India
Julius Baer

Ashish Shanker
Managing Director & CEO
Motilal Oswal Private Wealth

Sachin Taneja
President and Head, Wealth Management
Systematix Group

Kailash Kulkarni
Chief Executive – Investment Management
L&T Mutual Fund

Anand Varadarajan
Head of Global and Alternative Investment
NJ India Invest

Sagar Khandekar
Executive Director – Client Relations
Kotak Wealth Management

Gaurav Arora
Chief Investment Officer
Religare Private Wealth

Arpita Vinay
Managing Director and Co-Head
Centrum Wealth

5.00pm	Forum Ends