Indonesian Wealth Management Forum 2019

8.30am Registration

8.55am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.00am Panel Discussion

Wealth management in Indonesia – grasping the opportunity

- Is the wealth management offering in Indonesia evolving rapidly enough?
- What are the difficulties as well as advantages to launch a wealth management business in Indonesia?
- What are the catalysts to kick-start the domestic market? What are the roadblocks?
- Who are the players? What's their USP?
- Where are the biggest opportunities and challenges for insurance companies in Indonesia?
- Offshore / onshore. Where is the long-term opportunity?
- How does the wealth management market continue to develop in Asia? Big players vs bespoke firms?
- What should the regulators do to help spur further development?
- What can be done to build and retain a skilled, professional talent pool of bankers?
- To develop the onshore private banking / wealth management proposition, should leading local financial institutions can consider partnerships and alliances with established offshore firms, thereby leveraging their product range, expertise and talent?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Jens Reisch
President Director
Prudential Life Assurance

Edy Tuhirman
Chief Executive Officer
Generali

Simon Lints
Chief Executive Officer, Singapore
Schroders Wealth Management

Kenny Ho
Managing Partner & Founder
Carret Private Capital

Samdarshi Sumit
President Director & CEO
PFI Mega Life Insurance

Salina Nordin
Founder and Group Chief Executive Officer
Heritage Amanah International

9.40am

Presentation
Private Banking at a crossroads

Kok Hoe Wong
Director, New Markets
Bordier & Cie

- Building a private bank: 3 strategic questions
- Pillars of building a private bank
- Partnering through strategic cooperation

9.50am

Head - to - Head Q & A

How technology can drive more sales and deeper relationships

Dominic Gamble
Head of Asia Pacific
Wealth Dynamix

- The tech tools available to make RMs more powerful
- Use data to understand your clients better than ever
- Sell smart, sell tailored, sell more

10.00am

Presentation
Why wealth managers need effective onboarding

Shane Meredith
Asia Director - FinTech & Wealth Advisory
Contemi Solutions

- How onboarding drives clients away
- Onboarding for intergenerational wealth management
- Wealth management for the digital economy
- What your onboarding technology needs to do

10.10am

Presentation
How to improve key touchpoints in Wealth Management through digitalisation

Krzysztof Maurer
Managing Director - Thailand
Comarch

- Clients are changing and thoughtful digitalisation is more important than ever
- Improving customer experience is not sufficient enough to stand out on the market
- Employee experience is as important for your business to grow

10.20am

Panel Discussion

Bringing it all together – Platforms & Technology

- What are all the component parts you need to build a sustainable and profitable wealth management business?
- What is the Blockchain? How will it affect this industry?
- What is cryptocurrency and is there an investment trend?
- How do we safeguard digital assets like the security we get with traditional investment in shares and bonds?
- What digital expectations do clients have?
- What is the role of technology within financial services and wealth management?
- What are the key digital trends and how are they changing the business?
- What does the platform of tomorrow look like?
- Are traditional banks attractive enough for the new wealth creators and next generation of customers?
- Revenue margins per clients will decline in the future. Is digital a way to stop revenue erosion and are banks effective at monetising new digital services?
- What is the future role of the RM when banks get digital?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Dominic Gamble
Head of Asia Pacific
Wealth Dynamix

Ivan Jaya
Investment Head
Bank Commonwealth

El Lee
Co-Founder and Chief Operating Officer
Onchain Custodian

Mark Buesser
Chairman
IMTF

Reto Wolf
Head of Product Asia Pacific
additiv

11.00am

Presentation
RM Office - 2020 Advantage

Nagaraj Prasadh
Director & Country Head
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

11.10am	Refreshment & Networking

11.35am Head - to - Head Q & A

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

Maxime Fages
Head of Strategy & Digital Assets
Global Precious Metals

- Why and how should you buy physical gold?
- How do precious metals and digital assets align to maintain autonomy over assets?
- How do clients circumvent high volatility in cryptocurrencies?

11.45am Presentation
The Rise of Challenger Banks and Super Apps

Reto Wolf
Head of Product Asia Pacific
additiv

- What's the rising mass affluent opportunity in SEA?
- Who is going to capture that opportunity?
- How Super apps and Neo Banks reshape the WM landscape
- How incumbent banks can approach this ever-expanding customer base of the future

11.55am Presentation
What are the recent trends in ETF industry?

Ogar Renaldi Widjaja
Passive Sales, Head of South East Asia and Intermediaries
DWS

Despite challenging market environment and volatile 2019, the global ETF industry continues growing, as a wide range of investors (including sovereign wealth funds, insurance companies, private banks, family offices) continue using ETFs in their portfolios.

- How do these investors use ETFs?
- Which asset class has seen the strongest inflows and outflows this year?
- What are the recent trends in ETF industry? Are Thematic investing such as ESG and Artificial Intelligence gaining traction?

12.05pm 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?
- 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?

12.15pm

Presentation
Why is gold back in the news? The latest strategic developments shaping the precious metals industry

Joshua Rotbart
Managing Partner
J. Rotbart & Co.

- Why gold? Why now?
- Trends in physical gold
- Use cases

12.25pm

Presentation
HNW Insurance Outlook and Innovation

Thomas von Rueti
Chief Commercial Officer
Aviva Singlife

- Singapore Life Innovations with focus on the HNW space
- HNW insurance outlook 2020

12.35pm

Panel Discussion

Progress needed to boost the onshore investment proposition

- What are the opportunities and challenges for Indonesia's asset management industry?
- For years there have been discussions about opening international investments to Indonesia for distribution onshore, but will it ever happen?
- Tax amnesty money (with lock up period expiring) - do we assume that will head back offshore?
- What developments are we seeing in treasury and structured products like FX, bonds, dual currency investments etc?
- The domestic capital markets are relatively thin – what can be done to improve them?
- In Asia - how do 'funds' and 'investment products' get effectively distributed to clients? Why can't we do this in Indonesia?
- Has performance in the local market been lacklustre?
- Why are deposits still so popular?
- What must the regulator do? Why don't they do it?
- Why the need to restrict financial institutions and intermediaries from offering more access to foreign assets, when there are no restrictions on individuals sending money offshore? And why not offer a wider range of investment opportunities onshore as part of the draw of funds back to the country in the tax amnesty so that much of that hard work does not simply unravel?
- Any interest in ETFs? And interest in ESG?

Chair

Michael Stanhope
Founder & Chief Executive Officer

Hubbis

Speaker

Antony Dirga
President Director
Trimegah Asset Management

Keng Swee Koh
Executive Director, Regional Head Investment Product & Advisory, Wealth Management
DBS Bank

Ogar Renaldi Widjaja
Passive Sales, Head of South East Asia and Intermediaries
DWS

Handry Mulyo
Managing Partner
Kolega Capital

1.10pm Lunch & Networking

2.00pm Room A – Workshop

Investing in Precious Metals; Why it's time to add some shine to your portfolio

- Investing in Precious metals - where to store them
- Portfolio Diversification Within Metals, Active versus Inactive Investment

Shiv Tulsiani
Key Accounts Executive
Malca Amit

David Mitchell
Founder and Managing Partner
IPM Group

2.00pm Room B – Workshop

How to improve key touchpoints in Wealth Management through digitalisation

- Mobile experience for clients of tomorrow – high tech & high touch
- Driving advisors' productivity through tasks optimisation
- Practical examples of touchpoints improvements

Grzegorz Prosowicz
Head of Consulting and Product Management
Comarch Capital Markets

Parida Leelaniramol
Sales Director
Comarch

2.35pm 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 and Member of the Executive Committee
Henley & Partners

Daphne Chandra, IMCM
Country Head, Indonesia
Henley & Partners

2.35pm Room B – Workshop

What is CLM and how can it drive your business growth?

- The CLM journey: prospecting, onboarding, managing, engaging
- How CRM sits at the heart of CLM
- Exploring the efficiency gains for your internal teams and the insights for senior management

Dominic Gamble
Head of Asia Pacific
Wealth Dynamix

3.10pm Refreshment & Networking

3.30pm Panel Discussion

The Second and Third generations await – how will they protect the wealth?

The wealth management industry must develop its proposition and communication methodologies to gain maximum traction with the second and third generations of wealth in the country, especially as these individuals are worldly and well educated from Western colleges and as some 70% of HNWI's private wealth remains onshore, and that percentage is likely to rise.

- What challenges do wealthy families have and how is that changing?
- Are we ready for the intergenerational wealth transfer?
- How can we make the most of the opportunity that Wealth Planning and Structuring represents to us?
- How are the insurance products and solutions offered by Insurance companies developing?
- What is the value proposition of insurance for the wealth management industry?
- Whats the level of interest and demand from your clients in using insurance products and solutions - to either transfer wealth and / or optimize tax?
- When you consider all the options - UL VUL PPLI ect – what most relevant today? For you? Your clients?
- Curating the right solution for clients – what's thrown in the mix today?
- Finding the best advisory services and solutions – how do you maximise partnership with the right specialists?
- What specific trends are we seeing from Indonesian clients?
- Tax and transparency – problem or opportunity?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Marcus Hinkley
Head Of Client Services
Hawksford

Max Ezerins
Legal Counsel
The Sovereign Group

Thomas von Rueti
Chief Commercial Officer
Aviva Singlife

El Lee
Co-Founder and Chief Operating Officer
Onchain Custodian

Irene Lee
Director, Head of Business Development
Alpadis

4.15pm Panel Discussion

What do you need to do to be a successful wealth manager?

- What product knowledge and skills do you need?
- What 'BAD' practices from other markets must we avoid?
- How can learning and professional development help you add value and differentiate your offering?
- Why is improving skills so important?
- Trusted adviser – what does that even mean?
- What are the client's needs?
- Growing your AUM - client retention, existing client referrals and prospecting.

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Simon Lints
Chief Executive Officer, Singapore
Schroders Wealth Management

Richard Piliero

5.00pm Forum Ends