

MALAYSIA WEALTH MANAGEMENT FORUM 2022

8.30am Registration

8.55am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.00am Panel Discussion

Wealth Leaders – positioning for and embracing growth in the post-pandemic world

- What is your vision for wealth management in the Malaysia in a (hopefully) Post Covid-19 world?
- What growth potential lies ahead in 2022 and beyond, and where are the key opportunities for the foreseeable future?
- What is happening to the private client base, and how are clients' needs and expectations changing?
- How are leaders in this industry enhancing their value proposition, products and service offering?
- More generally, How will the competitive arena evolve in the coming years? Are the leaders ready for those challenges?
- How are you evolving the quality and type of advice you offer to clients?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Reuben Tan
Head of Wealth Management
OCBC Bank

Alvin Lee
Head of Group Wealth Management & Community Financial Services
Maybank

Vernice Moh
Managing Director, ASEAN
Refinitiv, an LSEG Business

Osama Khan
Product Manager – Wealth Management
Standard Chartered Bank

9.45am Presentation
Digitalization in Wealth Management

Ryan Page
Head of Sales (ASEAN / Pacific / South Asia), Wealth
Refinitiv, an LSEG Business

- What is it?
- Why is it important?
- Where do I start?

10.05am

Panel Discussion - Sponsored by Refinitiv, an LSEG Business

Driving Digital Transformation

- How do you use technology within your platform?
- What does digitalization mean to you and your firm?
- How are 'digital challengers' getting on? And what's the opportunity?
- Where are you up to in this journey?
- Is there a new wealth model that aligns both the human and digital in a seamless collaboration for the delivery of optimised investment products, ideas and advice for private wealth clients?
- What is coming next in the world of digital technologies and services that will further enhance the wealth management offering, and how can those improve the proposition?
- How do the private banks and retail banks make the right decisions, firstly on what areas to focus on, and then which solutions to adopt and which technology partners to work with?
- Are these digital tools really elevating the skills, capabilities and productivity of the client-facing RMs and advisors?

Chair

Michael Stanhope
 Founder & Chief Executive Officer
 Hubbis

Speaker

Wai Ken Wong
 Country Manager, Malaysia
 StashAway

Alvin Tan
 Chief Executive Officer
 UOB Kay Hian Wealth Advisors

Gurpreet Khera
 Chief Business Officer
 Boost Credit

Bobby Bok
 Sales Strategy & Execution Director, Wealth Solutions - Asia Pacific
 Refinitiv, an LSEG Business

Encik Khairi Shahrin
 Head of Digitalisation
 Malaysian Industrial Development Finance (MIDF)

10.45am

Presentation

Citizenship and Residency – Opportunities and Trends for the year ahead

Nirbhay Handa
 Group Head of Business Development
 Henley & Partners

- Alternative residences or citizenships in times of Political Uncertainty

- Domicile diversification – a new asset class
- Real estate investment rankings for migration

11.00am

Head - to - Head Q & A

Why is the Investment Migration industry booming?

Nirbhay Handa
Group Head of Business Development
Henley & Partners

- Where do your clients come from?
- Why do private wealth managers and advisors work with you?
- How can H&P help HNWI clients?
- What are the pitfalls that HNWIs should be aware concerning investment migration?
- What's changed post covid?

11.15am

Refreshment & Networking

11.45am

Panel Discussion - Sponsored by Jersey Finance

Tools and Strategies to secure your clients legacy for the next Generation

- Developments in Wealth Planning and Structuring, and Family Succession
- Challenges facing UHNW families
- NextGen expectations
- How are global attitudes towards Islamic Wealth Management changing?
- The increasing importance of sustainability, climate and ESG
- Transferring wealth successfully to the next generation
- How are founders, patriarchs, matriarchs and their families dealing with the estate and family business succession?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Farah Deba Mohamed Sofian
Partner
Messrs Wong Lu Peen & Tunku Alina

Nor Fazlina Binti Mohd Ghouse
Chief Operating Officer
Maybank Trustees

Daud Vicary Abdullah
Managing Director
DVA Consulting

12.30pm

Panel Discussion - Sponsored by Janus Henderson Investors

Investment Themes and Strategies for the year ahead

- What investment products and themes are interesting for HNW clients in Malaysia

today?

- From an investment perspective - what positive developments have we seen in the business of asset and wealth management in Malaysia?
- What is lacking in the local investment market? Like the ability to go short.
- How is the new tax regime affecting investors and changing priorities?
- Is there a growing interest in Private Markets?
- How are different tools being used in portfolios? For example, ETFs and Structured Products?
- How are clients generating income today?

Chair

Andrew Hendry
Head of Distribution, Asia
Janus Henderson Investors

Speaker

Shan Saeed
Chief Economist
IQI Global

Chi-cheun Teh
Managing Director
BOS Wealth Management Malaysia

13.00pm

Lunch

14.00pm

Forum End