Malaysian Wealth Management Forum 2017

8.40am	Registration
9.00am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
9.05am	Panel Discussion Building capacity and capability in wealth management in Malaysia • What's driving growth in the Malaysian wealth management market? • What do we need to do to move faster? • What are the needs of your clients? How can you help them? • Onshore / offshore • How can we develop the advisory proposition and make money out of it? • Can we change the mind-set and educate bankers to actually think about putting the client's needs first? • How do we approve the client experience? What does the industry need to do to prepare for inevitable changes? • What's the training and competency framework that's relevant and most effective? Chair Michael Stanhope Chief Executive Officer & Founder Hubbis Panel members Alvin Lee Head Group Wealth Management Maybank Pramod Veturi Managing Director & Country Head, Wealth Management, Malaysia Standard Chartered Bank David Koay Managing Director, Head of Wealth Management, Singapore & Malaysia Markets BNP Paribas Wealth Management Robert Foo Managing Director MyFP Services Speaker
9.55am	Presentation Investing In a synchronised growth environment Hanifah Hashim Chief Executive Officer Franklin Templeton GSC Asset Management

Franklin Templeton

- Global and Local market updates
- How to capitalise on the current market environment through Shariah investing

10.05am Presentation
Investor migration and the rise of the global citizen

Dominic Volek
Group Head of Private Clients
Henley & Partners

- Global trends and developments in investor migration
- What's driving investor migration for Asian HNWIs?
- Key considerations for HNWIs in relation to residence and citizenship planning

10.15am Presentation
Singapore & Hong Kong as Asian wealth management centres & overview of CRS and AEOI

Irene Lee
Head of Business Development, Singapore
Equiom Group

- Overview – Asia in general
- Singapore and Hong Kong as wealth management centres
- Singapore & Hong Kong companies
- Brief summary on CRS & AEOI
- Other estate planning tools

10.25am WealthTalk

How digital transformation and user experience can drive client behaviour

Pramod Veturi
Managing Director & Head, Wealth Management
Standard Chartered Bank

10.35am Refreshment & Networking

11.05am Presentation
Enhancing customer experience right from onboarding a client

Yvonne Mok
Director of Sales, Asia Pacific
Appway

- How to ensure effective account opening in the private banking and wealth management space?
- Any possibility to automate compliance/regulatory/KYC checks and risk calculation?
- How to stay ahead of your peers?

11.15am WealthTalk

Enabling digital wealth options in Asia

- How to make digital wealth a reality within your institution?
- Options for different segments: account aggregation, robo-advisory, hybrid advisory, thematic investing options, Sharia-compliance
- Regulatory progress and constraints across the region
- Organisational constraints to overcome

Bhaskar Prabhakara
Founder & Chief Executive Officer
WeInvest

11.25am WealthTalk

The importance of client investment suitability - what should we do?

- How should we determine the risk profile of a client?
- How should investment products be risk rated?
- What are some of the leading market practices?

Steven Seow
Head of Wealth Management, Asia
Mercer

11.35am WealthTalk

Impact investing from an Asian family office perspective

- Why do impact investing?
- What do we look for?

Tuck Meng Yee
Partner and Founder
JRT Partners

11.45am WealthTalk

Key considerations when selecting a wealth adviser - how to separate the good, bad and ugly

- A holistic approach to wealth management is fashionable to tout, but is it just a vacuous tagline?
- Is your relationship defined by product or advice?
- Unless your advisor has a conflict, do they have any interest?
- When 'yes' means 'no', and 'no' probably means 'yes'

David Sussman
Managing Director
EFG Wealth Solutions

11.55am WealthTalk

Emergence of Asian multi-family offices: a new option for those looking for service beyond brand

- The changing landscape of Asian wealth management: senior bankers offering their services in a regulated environment but outside the traditional banking platform
- For the family looking at succession planning and family governance issues
- Why the concept has emerged and how will it evolve in the foreseeable future

Philippe Legrand
Chief Executive Officer and Founder
LCA Solutions

12.05pm Panel Discussion

Wealthy business families – how do we meet their needs?

- How does CRS and information exchange create challenges or opportunities for wealth managers?
- Is this driving clients to get advice for the first time?
- What is the current level of knowledge and activity around preserving and protecting wealth?
- How do clients currently think about succession planning? What solutions do they use?
- How can we drive more effective and specific conversations about insurance and other products or structures for inter-generational wealth transfer?
- Who are the right professionals and advisers for families to engage? And how should they choose between them?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

David Sussman
Managing Director
EFG Wealth Solutions

Mahesh Kumar
Partner
Withers

Philippe Legrand
Chief Executive Officer
London and Capital Asia

Noor Quek
Chief Executive Officer & Founder
NQ International

Irene Lee
Head of Business Development
Equiom Group

Speaker

12.55pm Lunch & Networking

1.45pm WealthTalk

Why ESG investments matter for the next generation

- Drivers in growth of investor demand in ESG
- Innovation in ESG analysis: tools, solutions and opportunities

Linda-Eling Lee
Managing Director, Global Head of ESG Research
MSCI

1.55pm	Panel Discussion

Insurance – finding relevant solutions for Malaysian clients

- What are the priorities for insurance companies to develop their offerings to capture more of the wealth in Malaysia?
- The insurance industry is very profitable, but most of the money goes offshore. How can we keep it onshore?
- How do we drive the right types of needs-based conversations with our clients?
- How do we diversify the types of insurance products and solutions we sell to our clients?
- Where is new business going to come from over the next 5 to 10 years?
- What are the right tools and ways to engage clients today – and also the next generation?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Ken Yi Lam
Senior Product Manager, Bancassurance
Standard Chartered Bank

KL Wong
Chief Distribution Officer
StandardFA

Speaker

2.25pm	WealthTalk

Security in the age of uncertainty - IFCs

- Anti-globalisation and protectionism
- Role of international finance centres in Asian wealth planning
- Merits of IFCs to the global economy

Elise Donovan
Director
BVI House Asia

2.35pm	WealthTalk

Fee-for-service wealth management In Malaysia - a dream or a reality?

- Everyone has been talking about fee-based advisory year after year but nothing significant has happened. Why not?
- How can it work in practice? How should advisory processes and models be developed?
- Why is it important for the growth of the wealth management advisory industry? Threat or opportunity?

Ming Hui Yap
Founder & Managing Director
Whitman Independent Advisors

2.45pm	WealthTalk

The question is… do you want to be known for being smart, or for being wise?

- The skills you need for a new age of wealth management

David MacDonald
Head of Learning Solutions
Hubbis

3.00pm Refreshment & Networking

3.30pm Panel Discussion

The chicken and the egg: the asset management dilemma

- What can be done to facilitate mutual fund distribution in a meaningful way?
- Is it likely that we can deepen fund penetration?
- How do we further expand the product range? Is there a role for ETFs?
- When will we see a genuine move towards advice?
- How can we drive portfolio-led conversations and rebalancing?
- How do we penetrate millennials? What model would work?
- How can regulations help speed to market, to be able to attract more HNW interest in portfolio diversification?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Munirah Khairuddin
Chief Executive Officer
CIMB-Principal Asset Management

Yap Ming Hui
Independent Financial Advisor, Author & Managing Director
Whitman Independent Advisors

Ai Mei Chan
Chief Marketing Officer
Affin Hwang Asset Management

Alvin Tan
Chief Executive Officer
StandardFA

Steven Seow
Head of Wealth Management, Asia
Mercer

Anthony J. Harper
Chief Executive Officer and Co-Founder
Managed Account Partners

Speaker

4.15pm Panel Discussion

How will you navigate the investment markets in 2017?

- Will the markets retract in the second half of the year?
- How will the macro environment, interest rates, inflation and fund flows impact

performance?
- What will be the impact of US markets?
- How will geo-political risks impact the landscape?
- What can you do to protect the portfolios from, and take advantage of, the large-scale structural shifts in the horizon?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Mohd Fauzi bin Tahir
Chief Investment Officer, Equities
RHB Asset Management

Ted Low
Partner
GAO Capital

Clement Lee
Director, Business Development, Head of Sales - Singapore & South-east Asia
Legg Mason

Shan Saeed
Chief Economist
IQI GLOBAL

Michael Chang
Chief Investment Officer, Fixed Income
RHB Asset Management

Jeremy Ng
Chief Executive Officer, Singapore and Head of Sales, Asia
Leonteq Securities

Speaker

5.00pm Forum Ends