

Middle East Wealth Management Forum 2016

8.40am Registration

9.00am Welcome Address

Gary Dugan
Chief Investment Officer
Emirates NBD

9.05am Panel Discussion

Enhancing capability and capacity in wealth management in the Middle East

- What does Dubai need to do to continue to serve as a region hub for wealth management?
- What's the right value proposition in a more complex world of investments and transparency?
- Which business models will be the winners in the next 10 years?
- What is required in terms of infrastructure to get to this point?
- Which client segments should you focus on to be more profitable - and keep making money year after year?
- Although there is a growth in overall wealth – how do you better develop and define your value proposition to make the most of this opportunity?
- What might hold the local market back?
- Why has the growth of international banks in the Middle East slowed down? What implications does this have for the market, and also for client service and choice?
- Is there enough expertise in local banks to build relevant and viable private banking propositions for the future?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Georg Hartmann
Head of Private Banking, Middle East
Liechtensteinische Landesbank

Tim Searle
Founder and Chairman
Globaleye

Mihaela Cornelia Moldoveanu
Business Development Director
Jersey Finance

Andrew Mortimer
Managing Director, Country Manager - Middle East Region
Barclays

Hans Goetti

Chief Strategist at Middle East & Asia Banque Internationale A Luxembourg
Banque Internationale a Luxembourg

Gary Hales
Business Development Director - GCC and India
Jersey Finance

9.45am

Keynote Presentation

Outlook for GCC MENA Financial Market impact

Gary Dugan
Chief Investment Officer
Emirates NBD

- How the oil price crisis is bringing forward important change in MENA financial markets
- How local investor portfolios have to evolve and how financial advisers should encourage it

9.55am

Presentation

Can digitisation and robo-advisory make a difference to wealth management? A GCC perspective

Sandeep Lalwani
Executive Director – Europe and APAC
EbixCash Financial Technology

- Digital, automated advice - “Robo advisors” are likely to become a new norm in the GCC
- How can Robo advisory help institutions, HNWI, specifically in GCC?
- Best practices in Robo advisory
- Human advisory versus Robo advisers. Should they co-exist?
- Defining a Robo advisory value proposition
- Success stories

10.05am

Panel Discussion

Tapping into the new pipeline - where will growth in wealth come from?

- Accessing frontier markets from Dubai. What are the opportunities to tap wealth in countries such as Lebanon, Jordan, Egypt, Morocco, Tunisia, Kenya, Tanzania, Uganda, Ethiopia, Nigeria, Mauritius, South Africa, Egypt, Morocco, Pakistan, Bangladesh, India etc?
- Where is the growth in wealth going to continue to come from in the Middle East?
- Is economic diversification happening quickly enough? How can you create a sustainable business over time which is not oil related?
- The backbone of the economy in Dubai are SMEs. Are the banks and government supporting this in the right way?
- How can you most effectively nurture the wealth of tomorrow?
- There is rapid growth in wealth in Africa, plus China is having an increasingly strong economic influence on the continent. What does this mean for flows in and out of the Middle East?
- How big is the NRI opportunity? Are we doing enough for these clients yet?

Chair

Michael Stanhope

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Speaker

Yann Mrazek
Managing Partner
M/HQ

George Triplow
Partner, MENA Wealth & Asset Management Advisory Leader
EY

Akash Anand
Head of the MEA and APAC Regions, Managing Director - Regional Affairs
Profile Software

10.45am

Refreshment & Networking

11.10am

Panel Discussion

Advice - how can we raise the bar?

- There is a limited talent pool of private bankers and wealth managers. But growth in wealth is rapid. How can the industry plug the shortfall?
- Where is the biggest need to develop more capable and competent advisers in this industry?
- How can we move from a sales culture to an advisory mind-set?
- Conversations with clients are often one-dimensional. What should a more structured and helpful dialogue look like?
- How do you define a valuable offering that clients are willing to pay for?
- How can you attract the right people – and also new people to this industry? And then retain them?
- How can you develop more effective and productive teams? And what is the best way to manage your staff?
- What professional development framework would work best in the local market?
- How can training be viewed as an investment? Not an annoying cost?
- What are some of the best practices in other industries which can be applied to wealth management?

Chair

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Speaker

Rajesh Khanna
Head of Global Coverage, Private Banking
Emirates NBD

Subroto Som
Executive Vice President, Head of Retail Banking Group
Mashreq

Fadi Al Said
Director, Portfolio Manager/Analyst

Lazard Asset Management

Gifford Nakajima
Head of Wealth Development - UAE and MENA
HSBC Bank

Vic Malik
Head of Investment Advisory in Middle East, Singapore & Asia
Barclays

Gary Tiernan
International Private Banker

11.50am

Presentation
5 areas where technology may add value to the wealth management business

Grzegorz Prosowicz, Ph. D
Head of Consulting and Product Management
Comarch Capital Markets

- Threat or chance? The main challenges for the wealth management business
- Technology in action – how the industry answers to these changes
- How to add value for both the client and the wealth manager?

12.05pm

Presentation
Focus on distribution of financial products

Mahesh Bulchandani
Chief Executive Officer, Asia Pacific Operations
FinIQ

- So what does an adviser ideally need on a Workstation?
- How should that be delivered?
- What should the end-game look like?

12.15pm

Panel Discussion

Too much talk and not enough action - digital wealth in the Middle East

- Everyone is talking about 'going digital' – but what does that really mean?
- All industry players say they need to invest more in digital, mobile and platforms. Why don't they?
- How can you make the most of the existing technologies and channels?
- How can you benefit in terms of portfolio performance and risk?
- How far should we look to 'digitise'?
- How can you manage the number of disparate legacy systems which are now in place?
- What should be the priority for investment?
- Is consolidation the answer? How can you achieve this at a realistic cost?
- Digital is not just a client-facing opportunity – how can firms use analytics and big data to gain a competitive edge?
- Will the growth of fintechs have any real impact traditional players?
- Who will be the winners and losers in 10 years' time?

Chair

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Speaker

Anthony Jaganathan
Senior Vice President, Head of Operations & Middle Office, Wealth Management
Emirates NBD

Nayeem Khan
Managing Director and Head of Operations
Bank of Singapore

Damian Hitchen
Chief Executive Officer, Singapore
Swissquote

Luke Janssen
Founder and Executive Chairman
Tigerspike

Mahesh Bulchandani
Chief Executive Officer, Asia Pacific Operations
FinIQ

Milan Ganatra
Chief Executive Officer Miles Software Solutions

Haroun Dharsey
Senior Vice President, Head of Technology and Projects
Dubai Islamic Bank

12.55pm

Lunch & Networking

1.40pm

Panel Discussion

Why more diversified portfolios matter in the Middle East

- How do you construct a properly diversified portfolio for a client?
- Why is the industry so focused on pushing products?
- What are some of the challenges in getting clients to think more rationally and longer term?
- Whose responsibility is it to educate the client?
- What do most clients currently invest in? Does this make sense in today's environment?
- What role is there for other investments and asset classes? And also new geographies?
- How can we encourage clients to buy more alternative investments?
- Is there scope for discretionary portfolio management in the Middle East? How can we drive this debate?
- To what extent is the UAE becoming more of a safe-haven compared to other Middle Eastern countries?

Chair

Michael Stanhope
Founder & Chief Executive Officer
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Speaker

Deepak Mehra

Head of Investments Treasury, Asset Management and Global Markets Department
Commercial Bank of Dubai

Andrew Prince

Financial Planner

DeVere Acuma

Karine Kheirallah

Director - Investment Advisory

Liechtensteinische Landesbank

Lina Taher

Regional Manager of Funds & Investments, Middle East and Africa

Friends Provident International

Tom Anderson

Investment Adviser

Killik

Gary Dugan

Chief Investment Officer

Emirates NBD

2.30pm

Head - to - Head Q & A

How you can make learning and professional development more interesting and effective

Kees Stoute

Regional Private Banking Chief Operating Officer

EFG International

- What is the purpose of Learning & Development (L&D)?
- Is it possible to learn to become a good wealth manager?
- What is effective L&D?
- What are the conditions for L&D to be interesting and effective?
- What are the main L&D challenges in the industry?

2.40pm

Panel Discussion

Taking Sharia wealth management and Islamic products to the next level

- What are the key developments in Islamic wealth management?
- How are Islamic products marketed and distributed within a wealth management platform?
- Where can innovation come from to drive further growth?
- To what extent are Islamic products an important part of client portfolios? Why?
- How can the industry encourage more clients to use them as a part of their holistic wealth management?
- What is the role of the Middle East globally as Islamic wealth management gains greater traction?
- How can the region capitalise on its current expertise and capacity in Islamic products?
- To what extent can the Middle East move to the forefront in attracting Islamic clients from around the world?

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Speaker

Maya Marissa Malek
Managing Director
Amanie Advisors

David Marshall
General Manager, Products and Advisory, Wealth Management
Emirates NBD

3.10pm Refreshment & Networking

3.40pm Head - to - Head Q & A

How will the insurance offering evolve in the Middle East?

Walter Jopp
Chief Executive Officer, Middle East
Zurich International Life

- What are the key drivers for insurance companies to develop their local offerings?
- What are the main regulatory developments we will see over the next 12 months? What opportunities and challenges does that create?
- How should the regulators help facilitate the industry's further development?
- How are the propositions for various insurance products evolving? What new products are you developing?
- How is the distribution model developing? Including for IFAs, banks and insurance agents?
- Where will disruption come from?
- What is the role for different platforms and channels?
- What is the balance and demand between life insurance and other types of insurance?

4.00pm Panel Discussion

Wealth structuring - making the most of the opportunity today

- What's the opportunity from the growing need for smooth transmission of wealth to the next generation?
- What are the main challenges to wealth structuring and succession planning in the GCC?
- What is the reality of how you can use trusts to help your clients?
- What are the enforcement-related considerations?
- If you can't simply place assets into a trust to ensure their protection - what can you do?
- What are some of the structures and solutions to prepare for and minimise the impact of future disputes?
- Legacy planning for Middle Eastern families – do's and don't's
- What's the importance of soft legacy planning?
- Offshore versus local structures – what are the options? And for which types of clients do they work best?
- How can we deal with issues relating to property in tax markets like the UK and US?

Chair

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Hubbis

Speaker

Karima Abdesslami
Director, Head of Wealth Solutions, Global Asset Management
National Bank of Abu Dhabi

Peter Golovsky
Managing Director, Global Head of Institutional Sales
Amicorp Group

Fiona McClafferty
Senior Manager - Private Client Services
Deloitte

Ahmad Chahidi
Head Trust & Advisory Services
Emirates NBD

Alastair Glover
Principal Associate
Wragge Lawrence Graham

4.30pm

Panel Discussion

Moving wealth management forward in the Middle East

- What infrastructure and resources are required to move the market to the next stage of development?
- Where are the gaps? And how can they best be filled?
- What else do we need to do to improve the market?
- How can the regulators play more of a role to facilitate the development of the industry from here?
- What are some of the steps that regulators in other markets have made to support industry growth?

Chair

Michael Stanhope
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Hubbis

Speaker

Sean Kelleher
Chief Executive Officer
Mondial

Brendan Dolan
International Sales Director
Quilter International

Kees Stoute
Regional Private Banking Chief Operating Officer
EFG International

5.00pm

Forum Ends