

# Philippines Wealth Management Forum 2016

8.40am Registration

9.00am Welcome Address

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

9.10am Panel Discussion

What does 'wealth management' mean in the Philippines today?

- Who are the players? What motivates them to do wealth management?
- Is it a level playing field?
- Do trust banks understand their business models? What are they trying to achieve?
- Do they want to be experts on pensions? And on estate planning?
- Do other players in wealth management know what they want to achieve?
- Are firms focusing on the strength they have?
- What Initiatives do we need to help the development of the market?
- Do we need to be 'open architecture'?
- Is a 'private bank' really relevant in the Philippines?
- The Philippines still has a 'time deposit' mentality - how can that change?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Rafael Ayuste  
Senior Vice President / Group Head Trust & Investments Group  
BDO Unibank

Josefina Tiangco Tuplano  
Executive Vice President, Trust Banking  
Metropolitan Bank & Trust

Valerie Pama  
President Sun Life Asset Management  
Sun Life Financial

9.55am Presentation  
Can digitisation and robo-advisory make a difference to wealth management?

Sandeep Lalwani  
Executive Director – Europe and APAC  
EbixCash Financial Technology

- Digital, automated advice - "robo-advisers" are likely to become a new norm
- How can robo-advisory help institutions, HNWIs?

- Best practices in robo-advisory
- Human advisory versus robo-advisers. Should they co-exist?
- Distribution of funds in AMCs
- Defining a robo-advisory value proposition
- Success stories

10.05am

Presentation

New enterprise solutions for the wealth management industry

Stephen Lingard

Senior Vice President, Portfolio Manager

Franklin Templeton

- As financial institutions move away from product distribution to advisory services, the spotlight on risk management and asset allocation is growing.
- With DPM services currently limited to high network clients, how can banks and fund managers partner together to offer discretionary-like investment solutions efficiently to serve a growing emerging affluent segment in Asia?

10.15am

Panel Discussion

Compliance, regulation, tax and wealth structuring - are you confused?

- AML - meeting the challenges
- Do all institutions do their KYC seriously and consistently?
- Dealing with the reality of the regulatory burden, such as transparency and tax initiatives like FATCA and CRS - how prepared are you?
- On-boarding clients - what's the best way to improve this process?
- What challenges to both new and old wealth face in preserving and protecting their business and personal assets?
- What advice do families need in terms of investing for growth and re-generating wealth?
- Who are the right professionals and advisers to engage in meeting the compliance, tax and wealth structuring challenges? How should you choose between them?

Chair

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Speaker

Reynaldo Geronimo

Partner, Banking & Finance & Taxation Departments

Romulo

Steve Knabl

Chief Operating Officer & Managing Partner

Swiss-Asia Financial Services

Ida Mendoza

Trust Officer

CTBC Bank

Maria Paz Garcia

Vice President, Risk Management and Compliance

Bank of the Philippine Islands

Aaron Mullins  
Managing Director, Asiaciti Trust Singapore  
Asiaciti Trust

11.00am Refreshment & Networking

11.30am Presentation  
Residence and citizenship planning for Asian families - an overview

Dominic Volek  
Group Head of Private Clients and Member of the Executive Committee  
Henley & Partners

- Why do families relocate?
- What should HNW families consider when carrying out residence and citizenship planning?
- Current developments in residence and citizenship programmes

11.40am Presentation  
HNW insurance & wealth structuring is changing - here's how you and your HNW clients can benefit

David Varley  
Head of High Net Worth - Asia  
AXA

- One size doesn't fit all in the HNW marketplace
- Find out which HNW products match up with the differing needs of HNW clients
- By meeting your HNW clients' needs, you can secure more HNW clients, more revenue and more referrals

11.50am Panel Discussion  
Enhancing the engagement with customers

- How do we get people to move from a 'savings' to an 'investment' mind-set?
- Are we adequately educating clients around investments? What can we do better?
- How do you provide training to front-liner staff? How can we improve?
- How do they sell the product?
- Do we have adequate tools to engage the customer - and help them become investors?
- Do we make people aware enough about the risks? Or just the rewards?
- Do we need a higher level of certification and professional development to be a wealth manager?

Chair

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Speaker

Maria Lizette Perez  
Senior Vice President, Head of Private Wealth Division  
Metrobank & Trust

Dr. Robert Ramos  
Senior Vice President, Trust Officer and Chief Investment Officer  
UnionBank of the Philippines

Anthony Campbell-Brown  
Managing Director, Head of ASEAN  
AG Delta2

Noel Andrada  
Senior Vice President, Trust and Investments Group  
BDO Unibank

Roberto Vergara  
Chief Trust Officer & Head, Trust Banking Group  
Philippine National Bank

12.35pm

Lunch & Networking

1.25pm

Keynote Address

Developing the insurance industry in the Philippines

Atty. Dennis B Funa  
Deputy Insurance Commissioner

- How the insurance industry can develop
- Policy goals and roadmap
- Priorities for the year ahead

1.40pm

Panel Discussion

The development of insurance and the evolution into wealth management

- Where are the biggest opportunities and challenges for insurance companies in the Philippines wealth management space?
- How do they become more aligned and appealing to the younger generation?
- Are insurance companies engaging customers as effectively as they could? And marketing to them in a way that resonates with them?
- What is the right digital strategy? And what's the role for social media?
- How to enhance credibility and perception of agents in the eyes of consumers?
- Can the industry increase the number of productive agents - especially with younger talent?
- What can insurers do to better educate potential customers about their insurance-related needs and all the options available to them?

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Speaker

David Varley  
Head of High Net Worth - Asia  
AXA

Thomas Henze

Head of Global Private Wealth  
Swiss Life Global Solutions

Randell Tiongson  
Director  
Registered Financial Planner Institute

Nina D Aguas  
Chief Executive Officer  
Insular Life

Rizalina Mantaring  
President & Chief Executive Officer  
Sun Life Financial

2.25pm

Head - to - Head Q & A

Compliance dilemma

Anthony Campbell-Brown  
Managing Director  
AGDelta

- What do you feel are the greatest challenges for private banks and wealth managers at this time?
- What is AG Delta's approach to solving these problems?
- How does that approach differ from that of AG Delta's peers?
- AG Delta was once described by a Tier 1 bank as 'the original robo-adviser fintech'. How does that title marry up with helping the banks rather than the usual understanding of robo-advisers dis-intermediating the banks?

2.35pm

Refreshment & Networking

3.05pm

Panel Discussion

Distributing wealth management products - digital vs bricks-and-mortar

- Where and how do people most buy wealth management products in the Philippines?
- How is the product distribution process changing - or likely to change in the next few years?
- What role is there for digital platforms? How will these impact how products get sold, and the types of products offered going forward?
- How can product manufacturers as well as the banks and other wealth management firms engage the younger generation more effectively?
- What regulatory changes are needed to remove some of the overlaps and encourage product innovation?
- Does the SEC need to allow more product diversity? Is blocking new products counterproductive - especially if they have been allowed elsewhere in the world?
- What's the role of feeder funds and other ways to get more access to international markets?

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Founder & Chief Executive Officer  
Hubbis

Speaker

April Tan  
Vice President, Head of Research Department  
COL Financial

Leonardo Roxas Arguelles  
Managing Director  
Unicapital Group

Dhawal Kamath  
Country Chief Executive Officer, Philippines, Head of Products SEA  
EbixCash Financial Technology

3.50pm

Panel Discussion

What's the best investment advice you can give clients today

- How can clients really build a more diversified portfolio?
- How can we educate clients to have a long term mind-set?
- How can we make the engagement with investment solutions more 'sticky'?
- How can we encourage customers to think about retirement differently?
- Life-stage financial management - what does that mean to you and your clients?
- Do clients understand the risks?
- What are the best ways to get more people invested - and investing regularly?

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Speaker

Federico Ocampo  
Trust and Investment Group Senior Vice President, Chief Investment Officer  
BDO Unibank

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

Phillip Hagedorn  
Managing Director, Equities  
ATRAM Trust Corporation

Gaurav Malhotra  
Director - Capital Markets  
ASK Capital Management

Michael Enriquez  
Chief Investment Officer  
Sun Life Financial

Carlos Jalandoni  
Head of Research  
Bank of the Philippine Islands

4.50pm

Forum Ends