Philippines Wealth Management Forum 2019

8.40am	Registration
8.50am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
8.55am	Keynote Address Chair Opening Remarks: Why we are here! Malik S. Sarwar CEO K2 Leaders
9.00am	Panel Discussion Private wealth management - a time of dramatic change • What can you do to improve the value proposition in wealth management? • What does the current revenue mix of wealth managers in Asia look like? How is it changing? • How has AML changed the Onboarding Process in the Philippines? • What changes are we seeing in client expectations and behaviour? • Where will the continued growth come from and what are your priorities? • How do clients want to be serviced today? • How can you get the right people and proposition in front of the right clients? • The opportunities to collaborate and partner with international firms? • How important is digital today? • What are the main investment themes and the products that resonate with clients today? • What's the future of Discretionary and Advisory Portfolio Management in Asia? • Offshore / onshore. Where is the long-term opportunity? Chair Michael Stanhope Founder & Chief Executive Officer Hubbis Speaker Maria Paz A. Garcia Chief Risk & Compliance Officer, Risk Management & Compliance BPI Wealth Albert S. Yeo President BDO Private Bank Robin Heng Global Market Head Philippines, Australia, Indonesia and Thailand Bank of Singapore

Valerie Pama
President
Sun Life Investment Management and Trust Corporation

Philipp Piaz
Partner
Finaport

Christian Senn
Managing Director, Market Group Philippines Market
Credit Suisse Wealth Management

Malik S. Sarwar
CEO
K2 Leaders

9.45am Presentation
Transforming Wealth Management for the Future

Abhra Roy
Senior Product Line Manager and Head, Finacle Wealth Management
Infosys Finacle

- Redefining wealth management for 2019 and beyond
- Future Proofing your Business with a Truly Digital Platform

9.55am Head - to - Head Q & A

Global Citizens: Trends and Developments in Investment Migration

Scott Moore, IMCM
Managing Director
Henley & Partners

- Why is the Investment Migration industry booming?
- Why does H&P attend the Hubbis events?
- Where do our clients come from?
- Why do PBs/IAMs etc work with us?
- How can H&P help your HNWI clients?
- What are the pitfalls that HNWIs should be aware concerning investment migration?

10.05am Presentation
Private Banking: A new point of view

Evrard Bordier
CEO and Managing Partner
Bordier & Cie

- Building a private bank: 3 strategic questions
- Pillars of building a private bank
- The partnership approach

10.15am Presentation

Cyprus Island of Opportunities

Ioannis Ioannikiou
Legal Advisor
Casamont Cyprus

- Cyprus Investment Program
- Benefits of Cyprus when structuring your wealth
- Cyprus investment opportunities

10.25am Panel Discussion

Platforms and Technology - the future of private wealth management?

- The rise of Wealth tech in Asia – whats working and not working?
- Are banks going in the right direction in their digital journey?
- How can they implement a digital transformation strategy?
- What digital expectations do clients have?
- Has the investment in 'digital' justified the cost? What has worked elsewhere?
- The chicken and egg? Can you sustain the digital strategy for the bank?
- Transparency, Margins, Costs and Fees – what's changing?
- How must we tweak the investment engine? Can it be automated? Should it be more passive?
- How do we deliver 'funds' and investment products to our clients efficiently?
- What does the word 'platform' mean to you?
- Connecting customer data to market data – what does this mean?
- What's the role of technology and AI?
- Are FinTech's and Tech Giants threatening our business model yet?
- What disruptors have we seen? Have any been successful?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Anthony Thomas
Chairman
MoMo

Edison Tsai
Partner & Executive Director
SeedIn Technology

Damian Hitchen
Chief Executive Officer, Singapore
Swissquote

Michael Ferrer
Managing Director
ATRAM

Simon Wong
Sales Director, Greater China Region
ERI

11.10am Refreshment & Networking

11.35am

Presentation
Food for thought: CRS / AEOI – Practical experiences

Ivan Pelle
Founder & CEO
RGN

- CRS Common Reporting Standard – Developments - Participating vs Permanent Non-Reciprocal Jurisdiction
- AEOI Automatic Exchange of Information - Transparency & Tax Planning – Territorial vs WWI taxation
- Citizenship or residency by investment program – Todays complexities, the future? Solutions?

11.45am

Presentation
IMTF's Modular RegTech Platform – Building blocks to achieve regulatory compliance

Andreas Wenger
General Manager, APAC
IMTF

- Forward-looking technologies to tackle business challenges (Client Onboarding, Name Screening, AML / Fraud)
- Building on a strong case management foundation to achieve cohesive business operations benefits
- Enabling and ensuring end-to-end leading client and user experience

11.55am

Presentation
Digital Client Onboarding & E KYC

Sachin Gawade
Head Of Global Sales
EbixCash Financial Technology

- Hassle free on-boarding
- Touching Untapped markets
- Quick and Easy
- Digital Wealth Management

12.05pm

Presentation
The importance of Gold as a strategic asset

Joshua Rotbart
Managing Partner
J. Rotbart & Co.

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

12.15pm

Presentation
Outlook for Emerging market equities

Rob Mumford
Portfolio Manager, Emerging Markets Equities
GAM Investments

- Implications of recent changes in global growth forecasts
- What are monetary indicators (yield curve etc) telling us
- Role of China in the global growth story
- Outlook for China and Asian emerging growth and equity markets

12.25pm

Presentation
The HNW Insurance Market has Changed – Here's how you win

David Varley
Chief Partnership Officer - Brokerage, International HuBS
Sun Life

- What's happening in the HNW Market?
- How HNW Brokers, Bankers, EAM can adapt to win in the new HNW Insurance Market
- What are the new Products and Trends in HNW Market
- Why should Bankers and Financial Advisers be interested in HNW Insurance

12.35pm

Panel Discussion

The increasing importance of wealth solutions and planning

- What challenges do wealthy families have and how is that changing?
- Are we ready for the intergenerational wealth transfer?
- How will The TRAIN law affect wealth transfer by Filipinos in the Philippines?
- What are the effects of transparency on the conversation with clients?
- How can we make the most of the opportunity that Wealth Planning and Structuring represents to us?
- Any other emerging opportunities in wealth management?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Stella Cabalatungan
Executive Vice President
BDO Private Bank

Angie L. Pacis
Founder, President
KnowledgeLinks Wealth Solutions

Irene Lee
Business Development Director, Intermediary and Partnership
Hawksford

Ivan Pelle
Founder & CEO
RGN

Sebastien Hayoz
Managing Director
Asiaciti Trust

1.15pm	Lunch & Networking

1.50pm 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

Scott Moore, IMCM
Managing Director
Henley & Partners

1.50pm Room B – Workshop

Enhancing your impact to delight clients!

- Five habits of effective advisers
- Sales manager as effective leaders and coaches.
- How do you engage clients in challenging markets?
- Where is the return now?
- Simple solutions to discuss with clients today

Malik S. Sarwar
CEO
K2 Leaders

2.30pm Room A – Workshop

The World of Physical Gold

- Gold, what is it all about?
- Gold and its role in an investment portfolio
- Physical gold Vs. "Paper gold" and ETFs
- How to buy gold and other precious metals?
- How to store and how to insure your holdings?
- Know your gold bar - inspecting real gold bars and coins

Joshua Rotbart
Managing Partner
J. Rotbart & Co.

2.30pm Room B – Workshop

Accelerating Digital Wealth Management and Bancassurance

- Empowered, Digital Financial Advisory
- Digital journeys for Advisors and Clients
- A Digital Core Wealth Management engine for mid and back office operations

Abhra Roy

Senior Product Line Manager and Head, Finacle Wealth Management
Infosys Finacle

3.10pm Refreshment & Networking

3.30pm Panel Discussion

Investing in more uncertain and challenging markets

- Are we becoming more international in our investment thinking?
- Regulation and compliance – what developments?
- Impact of the new Tax Law on Investment Funds?
- Challenges and Opportunities for Unit linked insurance in the Philippines?
- How are you thinking about fund selection and portfolio construction?
- How has the Investment environment changed in Asia from 2017 to 2019?
- Managing and understanding risk — how do you estimate risk, and how does it impact your investment process?
- How do you think Asian equity market performance will be in 2019?
- Whats the outlook for emerging markets?
- What is interesting in the fixed income and credit universe today?
- Is the Philippines warming to index and ETF products?

Chair

Malik S. Sarwar
CEO
K2 Leaders

Speaker

Dr. Robert Ramos
Senior Vice-President, EastWest Bank Trust Officer and Chief Investment Officer
EastWest Bank

Roberto Vergara
FVP and Trust Officer Trust & Asset Management Group Head
Philippine Veterans Bank

Michael Gerard D. Enriquez
President and CIO
Sun Life Investment Management and Trust Corporation

Rob Mumford
Portfolio Manager, Emerging Markets Equities
GAM Investments

Adeline Tan
Partner, Wealth Business Leader
Mercer

4.15pm Presentation
Are You Future-proofing Yourself?

David MacDonald
Head of Learning Solutions
Hubbis

- Leveraging AI In Your Business
- The Human Skills That Might Help Keep You Relevant
- What's Your Strategy & Plan?

4.25pm	Closing remarks Key Takeways Malik S. Sarwar CEO K2 Leaders
4.30pm	Forum Ends