PHILIPPINES 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 Philippines 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 Tomas S. Chuidian President BPI Investment Management Albert S. Yeo President BDO Private Bank Arlene Agustin Senior Vice President, Private Banking Head UnionBank of the Philippines Donald Klip Managing Director, Co-Founder Global Mortgage Group
9.40am	Presentation Citizenship and Residency – Opportunities and Trends for the year ahead Scott Moore, IMCM Managing Director Henley & Partners

- Alternative residences or citizenships in times of Political Uncertainty
- Domicile diversification – a new asset class
- Real estate investment rankings for migration

10.10am Panel Discussion

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
- 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?
- Setting up of a Family Office
- Insurance as a liquidity tool to settle estate taxes
- Advantage of donation vs estate tax given same tax rate of 6%
- The role of residency and citizenship options

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Stella Cabalatungan
Executive Vice President, Head of Wealth Management Group
BDO Private Bank

Angie Marie L. Pacis
CEO
Philam Asset Management

Regina Jacinto-Barrientos
CEO
PJS Law

Scott Moore, IMCM
Managing Director
Henley & Partners

10.50am Refreshment & Networking

11.20am Presentation
How do you make digital assets a reality?

Richard Swainston
APAC Market Director
Metaco

- How are private wealth managers approaching the space?
- What are the factors leading to crypto and digital asset adoption in Singapore?
- How do you build the infrastructure to do digital assets?

11.40am Panel Discussion

Digital Assets – is this the next big opportunity?

- How would you explain the opportunity for digital assets in the Philippines?
- What segment is this relevant for?
- What's your business case for "moving into crypto"?
- How does it fit into a typical conversation around wealth and asset management?
- How have you built your platform and offering in this space?
- What are your priorities for the year ahead?
- What are the key criteria for choosing the technology to invest to (and the technology partners to deliver it)?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Catherine Anne P. Bautista - Casas
First Vice President, Head of Blockchain and API Business Group
UnionBank of the Philippines

Richard Swainston
APAC Market Director
Metaco

Peter Demeo
Global Head of Digital Asset Infrastructure Solutions
IBM

12.10pm Presentation
International Real Estate Financing for High Net Worth Clients

Donald Klip
Managing Director, Co-Founder
Global Mortgage Group

- Why traditional bank lending is constrained. GMG's solution
- Specialty Lending solutions – now being used by HNW investors
- Top financing trends globally

12.30pm Panel Discussion

Driving Digital Transformation

- How can the new wealth model align 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?
- What approaches does the panel consider the market players should take? Should they build, buy, or outsource, and how can they properly assess the providers?
- Are these digital tools really elevating the skills, capabilities and productivity of the

client-facing RMs and advisors?
- Do the banks and wealth firms know enough about the vital role of data management and analytics and the application of AI and Machine Learning?
- Is enough being achieved in the field of CLM/CRM to deliver personalisation, relevance, suitability and thereby achieve better levels of client loyalty?
- What's coming next and are we prepared?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

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

Dr. Robert Ramos
First Senior Vice President, Trust Officer and Group Head of the RCBC Trust and Investments Group
RCBC

13.00pm	Lunch & Networking
14.00pm	Forum End