

# PHILIPPINES WEALTH MANAGEMENT FORUM 2023

8.30am Registration

8.55am Welcome Address

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

9.00am Panel Discussion

Wealth Managers - Survive and Prosper in the new world

- How is the asset & wealth management industry evolving in the local market?
- What are the trends and developments we are seeing in Asian private wealth management?
- What growth potential lies ahead, and where are the key opportunities for the foreseeable future?
- Fees are being pushed down by investors and regulators – how will wealth managers survive?
- What has to change in the industry if it is to survive and prosper?

Chair

Scott Moore, IMCM  
Managing Director  
Henley & Partners

Speaker

Albert S. Yeo  
President  
BDO Private Bank

Kees Stoute  
Regional Private Banking Chief Operating Officer  
EFG International

Roberto Martin S. Enrile  
Head of Private Wealth Client Relationship Management  
Bank of the Philippine Islands

Dr. Robert Ramos  
President & CEO  
RCBC Trust Corporation

9.30am Presentation  
Wealth as a Service: Looking beyond the “Crazy Rich Asians”

Yash Shah  
Partner  
Synpulse

Global wealth managers are heavily investing with a laser focus on capturing the growing HNWI population in Asia’s emerging markets. The local universal banks are revamping their

client segments to provide tailored advisory services to the wealthy. But are the resources being allocated towards the correct target client base? Are we missing the accelerated growth of a particular wealth segment which will overshadow the HNW wealth base in the near future? Let's look beyond Asia's crazy rich and understand how WMs are gearing up with innovative wealth operating models to capture, service and retain this underserved population.

9.45am

#### Panel Discussion

##### Evolving the Platform and Proposition

- How have you been evolving your platform, processes, and products?
- What are the changing expectations of clients?
- How does this help you in the curation and delivery of advice?
- Have you made any real progress in your digital journey?
- How does digital improve your traditional value proposition?
- What are the products and services you could offer? How can your proposition evolve?
- What is your view on separate platforms that offer wealth management - external to a bank?
- What do you think about digital assets?

#### Chair

Pieter Zylstra  
General Manager - APAC  
additiv

#### Speaker

Marcy Kohchet-Chua  
Chief Client Relationship Officer  
ATRAM

Peter Faulhaber  
Head of Wealth and Personal Banking - Philippines  
HSBC Bank

Kees Stoute  
Regional Private Banking Chief Operating Officer  
EFG International

10.15am

#### Presentation

Millionaire Migration, Climate Change, and where your Grandchildren will live in 100 years

Scott Moore, IMCM  
Managing Director  
Henley & Partners

- Millionaire Migration – where did HNW relocate in 2022 and where are they going in the future?
- Climate Change – where will your grandchildren live in 100 years
- Hedging Sovereign Risk through domicile diversification

10.30am

#### Panel Discussion - in partnership with Henley & Partners

##### Current Trends and Concerns for International Families

- How do you use offshore wealth structures? What are some of the risks?
- How can you protect assets and wealth for the next generation?
- What will be the effect of CRS?
- What is the effect of beneficial ownership transparency?
- Which centres are likely to be most attractive in the future?
- What is the difference between a will and trust in Singapore?
- What are the trends around citizenship and migration?
- Can a local court challenge the validity of an offshore structure holding local Filipino assets?

Chair

Maita Kilayko  
Director  
Henley & Partners

Speaker

Stella Cabalatungan  
Executive Vice President  
BDO Private Bank

Woon Shiu Lee  
Managing Director & Group Head of Wealth Planning, Family Office & Insurance Solutions  
DBS Private Bank

Zac Lucas  
Partner – International Private Wealth  
Spencer West LLP

Joshua Gilbert F. Paraiso  
Partner  
PJS Law

11.00am

Refreshment & Networking

11.30am

Presentation  
Embedded Wealth opportunity in the Philippines

Pieter Zylstra  
General Manager - APAC  
additiv

- Evolution of embedded wealth
- Focus on customer needs
- Grow your businesses with embedded wealth in the Philippines

11.45am

Head-to-Head Interactive Q&A

The Development of the Independent Wealth Model in Asia

- Why have we seen an evolution of the independent wealth model in Asia?
- When did it all start in Singapore and Hong Kong what are the business models?
- What are the advantages for clients?

Philipp Piaz  
Partner  
Finaport

Jessica Cutrera  
President  
Leo Wealth

12.00pm

Panel Discussion

Curating winning client portfolios following a challenging year

- What are the opportunities and challenges for the year ahead?
- How are you managing risk in 2023? Is it time to take on more risk?
- What's your favourite asset class now?
- How are you generating income for clients?
- What's your view on alternative investments? Digital assets? Private Markets?
- How do you choose the right investment partners?
- How can you consistently deliver performance and differentiate your offering?

Chair

Yifei Li  
Managing Director, Institutional Sales  
Alta

Speaker

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

Rex Mendoza  
Managing Director  
Rampver Financials

Gautam Sharma  
Senior Vice President and Retail Bank Sales Network Head  
Unionbank

Caesar Antonino M. Ordonez Jr.  
Head of Investments, Private Banking Group  
UnionBank of the Philippines

Jason Gibbons  
Investment Director, Asia  
Leo Wealth

12.45pm

Presentation  
Providing the best service to your customers

Shaun Paterson  
Country Manager - Philippines  
Chelmer

- Understanding your customer's needs
- Helping your customers to help themselves
- Giving RMs the right tools to drive business

1.00pm

Lunch & Networking

2.00pm

Forum Ends