

# Redefining the Digital Evolution in Wealth Management 2015

8.40am Registration

9.00am Welcome Address

Anthony Northam  
Head of Market Development, ASEAN  
Thomson Reuters

9.05am Keynote Address

Building a digital bank - the journey so far

Olivier Crespin  
Chief Fintech Officer  
CIMB

Why build it in the first place? • Creating a clear roadmap • Implementation • Driving a revolution

9.35am Panel Discussion

Making digital matter – are banks doing enough yet?

- What does digital really mean in wealth management today?
- What are the priorities for banks to make the most of the technologies and channels which exist today?
- Are banks changing the way they think about and approach the development of new ways of doing business? What should they be doing?
- Usability and navigation: what's the right blend to really enhance the client experience? Is the intended client experience coming to fruition?
- Are clients' needs being served? Do you even know what they are?
- Flexibility Vs cost Vs track-record Vs speed? What matters most, and why?
- What is needed to do more with data?
- How can banks monetise digital platforms and initiatives? Are there any real KPIs?
- Is the investment and time really worth it? • Are banks able to differentiate their offering in such a competitive marketplace?
- Where are the real pain points banks can address using digital?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Ketan Samani  
Managing Director, Chief Digital Officer, Asis Pacific  
UBS Global Wealth Management

Yashesh M. Kampani

General Manager, Banking and Financial Markets, ASEAN  
IBM

Rajiv Agarwal  
Managing Director  
Arete Financial Partners

Iker Ibanez  
Director, Digital Transformation  
PwC

Adrian Hutzli  
Head of Sales  
SIX

10.15am

Keynote Presentation

Information impact and patterns in prices

Patrick Donaldson  
Head of Customer Strategy, APAC  
LSEG

- Do investors react incorrectly to information due to their emotions?
- Can machine readable news and big data help spot mispriced stocks?

10.35am

Refreshment & Networking

11.00am

Presentation

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

Grzegorz Prosowicz  
Head of Consulting and Product Management  
Comarch Capital Markets

- Threat or opportunity? The main challenges for wealth management
- Technology in action – how the industry answers to changes
- How to add value for clients and wealth managers?

11.20am

Panel Discussion

Are you ready for the disruption?

- What are the main digital trends driving and reshaping wealth management? Where is the biggest potential for digital disruption?
- Where exactly is transformation currently taking place?
- What does it take to compete in this space today?
- Will the cloud be the real game-changer for wealth management?
- Do banks have the people, culture and mind-set needed to adapt and thrive against the digital giants likely to enter this space?
- How and why is digital design the key to success in driving business transformation and client engagement?
- Rather than competing head-on – are there any immediate opportunities for disruptive technologies to provide private banks a way to extend their value proposition?
- What's missing and where are the main shortfalls – what will hold back banks and other traditional players from truly integrating new mobile, digital and social media-linked

solutions to drive new business?

Chair

Patrick Donaldson  
Head of Customer Strategy, APAC  
LSEG

Speaker

Hoong Shen Wong  
Executive Director  
UBS Global Wealth Management

Loic Pitrou  
General Manager, Asia  
additiv

Jacqueline Teoh  
Managing Director  
Orbium

Shiv Dewan  
Principal  
BCG

12.00pm

Head - to - Head Q & A

Digitisation of banks in Asia: the transformation of wealth management service delivery

Daniel Kennedy  
Sales Director  
SS&C GlobeOp

- What are the drivers behind the shift towards digital service models for banks in Asia?
- What kind of information and delivery channels are customer demanding?
- Is investment data and analytics keeping up with customer expectations?
- What kinds of service model transformation projects are you seeing in Asia?
- What are the biggest challenges around delivering data for client reporting?
- How can data and analytics give a competitive advantage?

12.10pm

Presentation  
Digital banking manifesto – a shortlist of the key principles for building a digital bank

Deirdre Jennings  
Managing Director, Asia Pacific  
AlfaSec Advisors

A look at how to manage the disruptive changes in banking by shifting focus and managing trade-offs. We propose 7 key principles to enable a bank to build a long-term digital roadmap for harvesting business benefits and creating a competitive advantage.

- BEHAVIOUR over segmentation
- HYBRID ADVISORY over autopilot
- CONVENIENCE over security
- SOCIAL over client adviser only
- CONTEXTUAL INSIGHTS over reporting
- ORCHESTRATION over integration
- DIGITAL LEADERSHIP over technology only

12.25pm

## Panel Discussion

The local perspective: a growing engagement in developing wealth centres

- Where is the opportunity across wealth and asset management in local markets to build-out the technology engagement
- What should the priorities be for different types of organisations within wealth and asset management? Especially in local markets?
- How can they get core banking right? • What are some of the practical challenges involved when buying new systems, software and solutions? How can these be addressed?
- How is the developing product-set impacting what platforms are now needed?
- What platforms exist to help bridge the gaps?
- Playing catch-up – what is the potential for lagging firms to use technology to help them leapfrog to the next stage of development? What are the options available to them? And the issues / challenges in taking this approach?
- What will the landscape look like in 5 to 10 years' time?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Thomas Askew  
Head Product Engineering, Investment and Bancassurance  
Standard Chartered Bank

Patrick Enjalbal  
General Manager, Asia Pacific  
Sofgen

Peter Scott  
General Manager Asia Pacific & Member of Executive Board - Avaloq  
Avaloq

Michael Chahine  
General Manager, Private Banking  
Emirates NBD

1.05pm

Lunch & Networking

1.50pm

## Panel Discussion

Getting your implementation right – learning from best practice

- What does a successful implementation look and feel like?
- What often goes wrong? And how can this be prevented? Looking in detail at each stage of the decision-making process
- Can vendors play a more meaningful or proactive role in helping local institutions? If so, in what ways?
- What does an effective vendor management framework look like?
- How can banks create IT teams that are commercially driven
- What's the best way to challenge IT professionals and broaden their experience? And ultimately retain them?
- Where can scalability come from? Is consolidation the answer? How can that approach help you tackle new technology requirements?

- How have the largest international institutions tackled these implementation challenges?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Urs Lichtenberger  
Managing Director - Head Client & Front Office Platform,  
Credit Suisse Wealth Management

Tony Greenwood  
Director, Global Transformation, Strategy and Business Performance Team  
RBC Wealth Management

Michiel van Selm  
Chief Operating Officer  
Canopy

Aaron Perryman  
Partner, Financial Services Advisory  
EY

2.30pm

Presentation  
Credit Suisse case study: a look inside a digital journey

Urs Lichtenberger  
Managing Director - Head Client & Front Office Platform,  
Credit Suisse Wealth Management

- The decision to go digital – why now?
- Client focused, not bank-focused
- Making all the pieces fit
- Where next with the platform?

2.45pm

Presentation  
Revolutionising commodities trading

Seamus Donoghue  
Vice President of Business Development  
Allocated Bullion Solutions

- Commodities is one of the last asset classes to follow an electronic path
- What's needed to make this happen?
- What will be the impact of a more tech-savvy and efficient market?

3.00pm

Refreshment & Networking

3.25pm

Presentation  
Multi-issuer platforms

Erdem Ozgul  
Managing Director  
Numerix

- Enhancing efficiency
- Creating a seamless front-to-back system
- Advantages for sell-side and buy-side

3.40pm

#### Panel Discussion

How to keep up with the advisory revolution

- What is having the biggest impact on the role and delivery of advice in wealth management?
- In what ways is this reshaping the landscape and advisory models?
- Robo-advisers – what do they mean for the advisory model?
- How can banks get better equipped to facilitate a move towards a quick, slick and personalised offering?
- What is needed to enhance relevance and context – and control – for client portfolios?
- Where will the next mobile wave of investment product come from?
- What does the next generation want from their wealth management experience? To drive the tools and services of tomorrow?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Edrick Ho  
Head of Digital and Channel Management, Retail Banking, Asia Pacific  
ANZ

Naman Shah  
Director Asia Pacific  
BizEquity

Valerie Bruce  
E-Business Specialist  
Quilter International

Deirdre Jennings  
Managing Director, Asia Pacific  
AlfaSec Advisors

4.20pm

#### Panel Discussion

Innovation: where next for technology in wealth management?

- How are today's technology and systems-related needs and priorities likely to develop?
- What tools or services will wealth managers of tomorrow need stay ahead?
- How can banks better service client obsessions with smartphones and tablets?
- What will be the challenges in implementing new solutions?
- The client experience of the future: how can you more actively involve the clients along the entire advisory process through the way they use online and mobile channels?
- Where's the balance between self-service banking and traditional wealth management?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

David Formula  
IT Manager for Wealth Management  
OCBC Bank

Neal Cross  
Managing Director and Chief Innovation Officer  
DBS Bank

Jeremy Hebblethwaite  
Head of Architecture, Integration & Security  
Julius Baer

Michael Yue  
Managing Director and GM, Google Hong Kong  
Google

5.00pm

Forum Ends