Taiwan Wealth Management Forum 2019

8.40am	Registration
8.55am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
9.00am	Panel Discussion Wealth management in Taiwan – grasping the opportunity • How is wealth management developing and changing elsewhere in Asia? • Who are the players? What's their USP? • Where are the biggest opportunities and challenges for the private wealth management industry in Taiwan? • Offshore / onshore. Where is the long-term opportunity? • How does the wealth management market continue to develop in Asia? Big players vs bespoke firms? • What should the regulators do to help spur further development? • What progress is needed to boost the onshore investment proposition? • Delivering investment products and advice to clients – How can you differentiate yourself? Chair Michael Stanhope Founder & Chief Executive Officer Hubbis Speaker Kimmis Pun Managing Director, Head of Private Banking, Singapore VP Bank John Robson Chief Commercial Officer Quantifeed Angie Lin Co- founder & Chief Investment Officer Assured Asset Management
9.45am	Presentation Strategic Cooperations in Private Banking Pearl Pillaert Associate Director, New Markets Bordier & Cie • Bordier: Private Bankers since 1844 • Strategic Cooperations in Private Banking • Bordier's Value Proposition

10.00am	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
10.15am	Presentation The digital watch or the hand-made Swiss? Kimmis Pun Managing Director, Head of Private Banking, Singapore VP Bank • How is private banking developing? • How do you add value and differentiate yourself? • What are the different business models you can consider?
10.30am	Head - to - Head Q & A GOLD - shining brighter every day Christophe Numa Managing Director Bunker Group Gold & Silver • Why is this a good opportunity today? • What are the reasons why you should invest in precious metals? • Where should you keep your gold?
10.40am	Refreshment & Networking
11.10am	Panel Discussion Bringing it all together – Platforms & Technology • What are all the component parts you need to build a sustainable and profitable wealth management business? • What is the Blockchain? How will it affect this industry? • What is cryptocurrency and is there an investment trend? • How do we safeguard digital assets like the security we get with traditional investment in shares and bonds? • What digital expectations do clients have? • What are the hurdles hindering Taiwan's FinTechs? • What are the key digital trends and how are they changing the business?

- What does the platform of tomorrow look like?
- Are traditional banks attractive enough for the new wealth creators and next generation of customers?
- What is the future role of the RM when banks get digital?
- What's the potential for non-banks and other start-ups to eat into existing market share of organisations built on a traditional business model?
- Have we seen any examples of tangible success in digital wealth management?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Alexandre Kech
Director, Blockchain and Digital Asset
Citi

Johanan Thomas
Market Development Performance Director, Wealth
Refinitiv, an LSEG Business

Karsten Kemna
Managing Director - Asia Pacific
ERI

Dominic Chan
Senior Executive, Strategic Partnerships
Quantifeed

11.55am

Presentation
The Wealthcare Journey

John Robson
Chief Commercial Officer
Quantifeed

To meet customers' growing expectations of wealth management, financial institutions are looking for ways to provide planning and advisory services with greater efficiency, flexibility and scale. With the rise of robo-advisors, micro-investment services and portfolio management tools, WealthTech is a real game-changer. But where does this journey begin, what are some of the common pitfalls along the way, and what are the key benefits?

Join John Robson, Chief Commercial Officer of Quantifeed, as he takes you on a tour of how WealthTech enhances the customer experience, provides efficiencies for advisors, and creates value for your organisation.

12.10pm

Presentation
The Opportunity and Challenge of Global and Asia Fund Industry

Xav Feng
Director, Lipper Asia Pacific Research
Refinitiv, an LSEG Business

- Takeaways from Major Global Investment & Wealth Management Trends
- Major Disruptive Trends including Demographic Drivers, Regulatory Initiatives, Financial

Technology (FinTech & Quant) and Environmental, Social & Governance
- Challenges and Opportunities for Robo-Advisors and ESG

12.25pm	Presentation Kick Starting Your Digitization Project

Simon Wong
Sales Director, Greater China Region
ERI

- How can technological innovation and digitalization help improve business efficiencies and profitability?
- How can you get your digital project started and then executed effectively?
- What are the success factors that will help you manage a successful digitalization initiative?

12.40pm	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
- AEOI and CRS practical experiences

12.55pm	Presentation Mission-Driven Investing: Constructing a smart portfolio

Violetta Mavroyiakoumou
China Desk - Sales Manager
Nicolaides Group

- From Real Estate to turn-key solution. 40 years of learnings
- A smart amalgam for investment in 2020
- Cyprus: a strategic pathway for global expansion

1.10pm	Lunch & Networking
2.00pm	Forum Ends