Wealth THINK 2016

8.40am	Registration
9.00am	Welcome Address Patrick Donaldson Head of Customer Strategy, APAC LSEG
9.05am	Panel Discussion Stuck between a rock and a hard place • What are the opportunities and challenges you face today? • How will the Asian wealth management industry adapt and evolve to deal with the challenges that exist? • How would you describe the opportunity that the growth in wealth represents to you? • Who is likely to build a profitable and sustainable platform and proposition in the years to come? • How do we navigate the regulatory challenges – but not kill the industry? • Given the changing framework around suitability – is it still possible to add value to clients? Chair Michael Stanhope Founder & Chief Executive Officer Hubbis Speaker Bassam Salem Region Head, Asia Pacific Citi Private Bank Tan Su Shan Group Head, Consumer Banking and Wealth Management DBS Bank Mark Smallwood Managing Director, North Asia Coverage Team Head Deutsche Bank Wealth Management Urs Brutsch Managing Partner & Founder HP Wealth Management Julian Kwan Co-Founder and CEO InvestaX Michael Benz Former Group Head of Private Banking Standard Chartered Private Bank
9.55am	Presentation

Risk & compliance – an inconvenient truth

Julia Walker
Head of Market Development, Risk, Asia
Thomson Reuters

- Like it or not, wealth managers have to deal with rules & regulations
- Using the right vendors, can they turn risk & compliance into a competitive advantage?

10.10am	Presentation Can I cut compliance in half and still keep my license?

Stefan Kuhn
Head of Compliance, Private Bank (Southeast Asia)
Credit Suisse

- Do I need a compliance department at all?
- Cut in half: people or cost?
- What's the right number of people in compliance?
- Onshore vs offshore – what drives cost efficiency?
- Peel off the compliance label to reduce cost

10.25am	Refreshment & Networking
10.55am	Panel Discussion

Onshore versus offshoring – that is the question?

- Is the big opportunity now onshore?
- How is the wealth management proposition improving in local markets?
- How quickly will the product and service offering develop?
- What does Indonesian tax amnesty mean for Singapore - and you?
- Can you engage the onshore wealth management opportunity?
- Should foreign players compete or collaborate with onshore institutions?
- How do you decide who to partner with?
- What's the role that wealth hubs like Singapore and Hong Kong will play in the future?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Vincent Magnenat
Limited Partner, Global Head of Strategic Alliances, Asia Regional Head
Lombard Odier

Marie Ramlie
Head of Retail Products TMB Bank
TMB Bank

Amit Shah
Chief Executive Officer, Co-founder and Member of the Board IIFL Asset Management

360 ONE Wealth

Rolf Haudenschild
Country Head, Singapore BRP
BRP Bizzozero & Partners

11.45am

Presentation
How to make your value proposition unique

Nick Pollard
Managing Director, Asia Pacific
CFA Institute

- Professionalism, standards, diversity and more

12.00pm

Presentation
Retail investor dynamics in Singapore's asset management market

Thusitha De Silva
Director
Cerulli Associates

- Are asset managers are responding to private banks' outlook on investment products? How convinced are retail investors about investing in such products?
- Are private banks' attempts to shift into fee-for-advice models hitting the spot with retail investors?
- An increase in digital engagement in wealth management is the only area where providers and customers agree on. But what are retail investors' main concerns about digital advice, ie. robo-advisers?

12.15pm

Panel Discussion

What does it take to succeed in a new world of wealth management?

- What do clients look for from anyone who services them in wealth management today?
- Who are the real competitors of tomorrow?
- What's the role for the many different market players – international and regional banks, insurance companies, IFAs, independent wealth managers and others?
- Do we really understand the needs of our clients?
- Are we in a position to service those needs?
- What's our unique proposition? What are we really good at?
- What does a client want from a private bank – and their banker today?
- Do we need to re-think how we communicate with and educate clients?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Vineet K Vohra
Director & Practice Leader - Wealth Management
Arete Financial Partners

Martin Frick
Managing Director, Asia Pacific
Temenos

Tanmai Sharma
CEO and Founder
Canopy

Philipp Piaz
Partner
Finaport

Lee Kai Yang
Chief Investment Officer
RHB Asset Management

Aki Ranin
Head of South-east Asia
Tigerspike

1.05pm Lunch & Networking

1.55pm Panel Discussion

Can we fix the talent problem?

- With the number of private bankers in Singapore and Hong Kong falling – who will replace them?
- What are the consequences of the unprecedented number of expats leaving?
- How as an industry can we attract young, engaging and competent individuals?
- What do we have to do as an industry to make sure we remain relevant?
- Do we need to re-think the role we play as bankers?
- Given that private bankers today make less money and face a greater administrative burden, why does anyone want to be a private banker today?
- Can we bring back the fun to private banking?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Herwig Van Hove
Chief Executive Officer
Vahoca

David Koay
Managing Director, Head of Relationship Management, ASEAN, Private Bank
Standard Chartered Bank

Murli Adury
Head Citigold Private Client, APAC & EMEA
Citi

Vikram Nimkar
Head of Premium & Private Wealth

Westpac

Urs Palmieri
Director, Financial Services Advisory, Performance Improvement Strategy
EY

2.45pm Presentation
Open platform technology – leverage & connect your systems

Matthew Blume
Director, Client Technology ASEAN
Thomson Reuters

- Building your own applications within an open platform can connect multiple data sources
- This allows users to leverage big data and analytics to brings actionable insights across a number of different use cases

3.00pm Presentation
Removing the funds penetration blockage

Andrew Hendry
Managing Director, Asia
Westoun Advisors

- What are the challenges to greater funds penetration in Asia?
- What are the best practices among fund gatekeepers?
- How to open the funds funnel a bit wider

3.15pm Refreshment & Networking

3.45pm Presentation
Common Reporting Standard amendments in 2017

Mark Morris
Chief Executive Officer
Mark Morris Consulting

- Assumed non-reporting strategies which won't work despite legal opinion to the contrary
- Is there any structure which cannot be affected by CRS / FATCA amendments?

4.15pm Panel Discussion

How can you deliver investment performance for your clients today?

- Do we really have needs-based conversations with our clients and offer them solutions?
- How do you make any money today for yourself and your clients, especially given the interest rate environment?
- How do you generate income for your clients today?
- What do you need to re-structure your product platform to make it profitable?
- Do we have any interesting products for our clients? Or will they look elsewhere?

- How do you navigate the regulatory environment around investment suitability?
- What the role for digital as a disruptive force in the product pipeline?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Adam Cowperthwaite
Head of Markets, Citi Global Wealth APAC
Citi Private Bank

Gebhard Giselbrecht
Managing Director, Head of Strategy & Products for Asset Management - CH/EMEA
UBS

Michael Thompson
Executive Vice President, Head of Singapore office and Head of Wealth Management Group Asia (ex-Japan)
PIMCO

John Cappetta
Executive Director, Head, Managed Solutions Advisory
Julius Baer

Andrew Hendry
Managing Director, Asia
Westoun Advisors

5.05pm Forum Ends