



Survival of the Fittest

Winning Private Banking Models in an Ever Tougher Wealth Market

The days of effortless client recruitment and easy profits are over, even in booming Asia-Pacific. Business models and client strategies are being ruthlessly changed to meet the challenges of tomorrow's wealth markets worldwide. And which will be the leading Asian private banking models of tomorrow?

AGENDA 24 OCTOBER 2012

0800 - 0900	Welcome Coffee & Registration in the Exhibition Area	
0900 - 0905	Welcome Remarks Titien Ahmad , Regional Director, VRL Financial News	
0905 - 0930	Opening Address John Evans , Editor-at-large, Private Banker International Nicholas Moody , Editor, Private Banker International	
KEYNOTE SESSION 1 0930 - 1100	Asia - the Region of Broken Dreams or the Best Game in Town? <i>Asia-Pacific now accounts for 25% of global HNWI's wealth, and looks set to overtake North America in the next two or three years, with China alone likely to have a higher proportion of the world's HNWI's wealth by 2030. However, a chill has set over key wealth markets, such as India and Japan, as major banks retreat from these markets.</i> <i>Will the far-reaching aftershock of the GFC and the Eurozone crisis continue to subdue client trading volumes and squeeze margins in the next 12 months? Which banks are going to stay in the wealth game? How will banks withstand the legal and regulatory assault?</i>	
		Rory Tapner , Chief Executive, Coutts
	Shifting Gears : Adapting to changes in Asia's wealth creation journey	Rajesh Malkani Head of Private Bank East Standard Chartered Private Bank
	TBA	BNP Paribas
1030 - 1100	PANEL DISCUSSION Tan Su Shan , Managing Director & Group Head of Wealth Management, DBS Bank Michael Lagopoulos , Deputy Chairman, Royal Bank of Canada Rajesh Malkani , Head of Private Bank East, Standard Chartered Private Bank TBA , BNP Paribas Moderator: Peter Flavel , Chief Executive Officer, J.P. Morgan Private Wealth Management Asia	
1100 - 1130	Coffee Break in the Exhibition Area	



PLENARY SESSION 2 1130 - 1300	Changing Business Models to Capture the New Reality <i>Increasing demanding clients need to be accommodated with fine-tuned business models that target specific client segments with tailored service models. With the new normal on the ground, private banking players are also looking to rationalise and shed non-core operations.</i> <i>At the back-end, systems are starting to gain recognition to help reduce the high operational costs in private banking starting with great mark-to-market daily portfolio valuations through to robust back-office reporting and reconciliation.</i> <i>Social media networks and tablet technologies look to be increasingly important in attracting and keeping new clients, particularly in tech-savvy Asia where many HNW individuals tend to be younger than their Western counterparts. Banks may be reluctant to engage with social media but clients are demanding greater connectivity. If you miss the train now leaving the wealth platform, you may never catch up.</i>	
1130 - 1150	The flood of M&A to come in Wealth and Asset Management globally <ul style="list-style-type: none"> • Almost everything is for sale • Who will be the buyers • Will prices fall even further 	Ray Soudah Founder Partner & Chairman Millenium Associates
1150 - 1210	Ready for Take-Off <ul style="list-style-type: none"> • Current EAM landscape in Asia • Challenge or opportunity for the traditional players • The way forward 	Dr Mario A Bassi Managing Director, Head Asia Solution Providers Management Consulting Pte Ltd
1210 - 1230	Private Wealth Management: The Next Generation of Customer Experience <ul style="list-style-type: none"> • Developing a client-centric business model in Asia • Risk Management – reputation, operational risks and regulatory issues • Invest in operating models and technology to drive higher customer engagement 	Nick Kalikajaros Regional Director – Private Wealth Management Asia Pacific & Middle East Temenos
1230 – 1300	PANEL DISCUSSION Ray Soudah , Founder Partner & Chairman, Millenium Associates Dr Mario A Bassi , Managing Director, Head Asia, Solution Providers Management Consulting Nick Kalikajaros , Regional Director, Private Wealth Management Asia Pacific & Middle East, Temenos Moderator: Michael Lagopoulos , Deputy Chairman, Royal Bank of Canada	
1300 - 1400	Lunch in the Exhibition Area	



PLENARY SESSION 3 1400 – 1530	Investment Products in a new Risk-Averse Environment	
1400 – 1420	Asian Local Currency Bonds: An Emergent Asset Class <ul style="list-style-type: none"> • The Asian economies have been exhibiting strong growth trends while more developed nations have recently shown signs of contraction. • Asian local currency bonds provide opportunities to participate in the growth of rising Asian economies. What are the key drivers for the growth of this regional asset class? • What is an efficient way to gain exposure to this assets class? 	Ng Kheng-Siang Head of APAC Fixed Income State Street Global Advisors
1420 – 1440	TBA	Gary Dugan Chief Investment Officer, Asia and the Middle East Coutts
1440 - 1500	Wealth Management for the Ultra High Networth (UHNW) Clients <ul style="list-style-type: none"> • Focus on Wealth Creation : Incorporating the wealth tied up in the company • Risk Management Solutions • Barbell Approach to wealth management 	Anurag Mahesh Head of Global Investment Solutions and Key Client Solutions, Asia Pacific Deutsche Bank
1500 - 1530	PANEL DISCUSSION Bryan Henning , Managing Director, Head of Global Research & Investments, Asia, Barclays Gary Dugan , Chief Investment Officer Asia & the Middle East, Coutts Anurag Mahesh , Head of Global Investment Solutions & Key Clients Solutions, Asia Pacific, Deutsche Bank Marc Lansonneur , Regional Head of Investment Teams & Market Solutions, Societe Generale Private Banking (Asia Pacific) Ng Kheng-Siang , Head of APAC Fixed Income, State Street Global Advisors	
1530 - 1600	Coffee Break in the Exhibition Area	
PLENARY SESSION 4 1600 - 1730	UHNW – Moving Money Globally for the Ultra-Wealthy <i>The evolving tax and regulatory environment is becoming ever-more draconian, particularly from the US which is gradually extending the extra-territoriality of its regulators. How can the centuries- old, family-run private banks welcome new wealth alongside regulation? Which are stable jurisdictions of integrity which you -- and your UHNW clients -- should favour in Asia -- rather than any Western centres? What is the impact of regulation like America's FATCA action on cross-border families? Why do Asian UHNW need more convincing for family offices?</i>	



1600 - 1630	TBC	Bruce Weatherill,
1700 - 1730	PANEL DISCUSSION James Aitken, Managing Director Private Wealth Solutions, HSBC Private Bank	
1730	Close of Private Banker International Wealth Summit	
1830 - 1920	Pre-Awards Dinner Cocktail Reception	
1920	GUESTS TO BE SEATED. Private Banker International Awards DINNER COMMENCES.	
2000	Guest Speaker: H.E. Tan Sri Rafidah Aziz	
2215	Close of Private Banker International Awards Dinner	

The organiser reserves the right to amend the programme as and when necessary.