Private Banking: Switzerland 2016 Conference and Awards
Conference Agenda

08:00-09:00 **Coffee & Registration – Century Foyer**

09:00-09:05 **Chairperson’s welcome and scene setting**
Meghna Mukerjee, Editor, Private Banker International

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**SESSION ONE: The Private Banking Landscape in Switzerland**

09:05-09:30 **Keynote Presentation - UBS**

Paul M. Raphael, Head Wealth Management, Europe & Emerging Markets, UBS

09:30-09:50 **How Digital can Change the Banking Model**
- Customer needs in a digital world
- Technology as key enabler to grow in Swiss private banking
- The paradigm of industrialisation
- Leveraging ecosystems to succeed in digital banking

Michael Rogenmoser, General Manager Switzerland & Liechtenstein, Avaloq

09:50-10:10 **Growth in Private Banking**
- Developments in Swiss private banking: overview on key figures and the private banking landscape
- UBP and its acquisitions in private banking: overview on UBP’s financial foundations and acquisitions since 2000
- Growth drivers: organic vs. inorganic growth and its main drivers
- Success factors of acquisitions

Peter Schmid, CEO, UBP Zurich

10:10-10:30 **The Rise of the Digitally Enabled Advisor – Leveraging Social, Web, SMS and Emails to Drive Engagement**
- The world has gone digital and old ways of prospecting are not working
- Increasing regulations are placing more burden on companies
- How can companies empower their advisors to become smarter about their clients and grow more business in 2016?

Chris Andrew, Director, Hearsay Social

10:30-10:50 **Speaker Discussion and Audience Q&A**

**Panellists include:**
- Henrik Herr, Head IWM Germany & Austria, Credit Suisse AG
- Michael Rogenmoser, General Manager Switzerland & Liechtenstein, Avaloq
- Chris Andrew, Director, Hearsay Social
- Peter Schmid, CEO, UBP Zurich

10:50-11:20 **Networking Coffee Break – Century Foyer**

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SESSION TWO: What is Driving Profitability and Customer Centricity Today?

11:20-11:40 From Single Products Towards Holistic Advice
- Adapting to new customer behaviour and demands
- The ‘client’s balance sheet’
- Where is the money?
- The rise of socially responsible investments

Philipp Rickenbacher, Member of the Executive Board & Head Advisory Solutions, Bank Julius Baer

11:40-12:00 Harnessing Disruption to Succeed in the Swiss Market
- Technology driving the evolution of the banking and wealth management business
- Increasing client expectations on digitisation
- Bridging technology and business

Ton Kentgens, Global Business Development, Private Wealth Management, Ortec Finance

12:00-12:20 Opportunities and Challenges of Cross Border in Wealth Management Industry
- A complex environment
- A strong impact on Swiss banks
- Strategic refocus?

Pierre Vrielinck, CEO Wealth Management Switzerland & Emerging Markets, BNP Paribas

12:20-12:40 Tapping into Alternative Investments
- Meeting the desires of high net worth individual (HNWI) clients
- How do alternative investments differ from traditional investments?
- What are the benefits to wealth managers?
- Easy and secure trading offer

Paul Hewitt, Head of Client Strategy EMERI Chairman’s Office, Christie’s

12:40-13:00 Speaker Discussion and Audience Q&A

Panellists include:

- Pierre Vrielinck, CEO Wealth Management Switzerland & Emerging Markets, BNP Paribas
- Paul Hewitt, Head of Client Strategy EMERI Chairman’s Office, Christie’s
- Hans-Peter Borgh, Global Head of Wealth and Investment Management, Banque Internationale à Luxembourg
- Ton Kentgens, Global Business Development, Private Wealth Management, Ortec Finance

13:00-14:00 Networking Lunch – Century Foyer
SESSION THREE:
From Traditional Wealth Sanctuary to Modern Wealth Management Hub

**Chairperson:** Stefan Becker, Managing Partner, Juna Asset Management

14:00-14:20  **The Great Intergenerational Wealth Transfer – Tides of Change**
- The importance of catering to the digitally savvy next generation’s needs
- Right segmentation for the right results
- The rise of robo-advisors – can they compete with traditional wealth managers?

**Karen Aslanian**, Executive Vice President, **Lombard Odier Darier Hentsch & Cie**

14:20-14:40  **How Digital Natives Interact with Private Banks in the Near Future**
- Rise of new technologies for customer contact: chat, chat bots, voice controlled devices
- Seamless user journeys for private banking clients across these channels, with a human touch
- Case study: chat based user interaction for robo advisory

**D.P. Kruyswijk**, Digital Finance Strategist, **Virtual Affairs Switzerland**

14:40-15:00  **Data as a Differentiator**
- Data capabilities that you need to enable your digitalisation program
- Why data is key in the regulatory environment - the impact of GDPR
- Case studies: conduct risk, single client view, customer insights, advanced methods

**Christian Westermann**, Partner, **PwC**

15:00-15:20  **The Next Wave of Digital Investors and the Role of Roboadvisors**
- Transformation of wealth management
- The effect inter-generational change
- Hybrid-roboadvisors
- TechRules solution

**Javier Carrallo**, Business Development Manager, **TechRules Financial Solutions**

15:20-15:40  **Speaker Discussion and Audience Q&A**

*Panellists include:*
- **Karen Aslanian**, Executive Vice President, **Lombard Odier Darier Hentsch & Cie**
- **Christian Westermann**, Partner, **PwC**
- **Javier Carrallo**, Business Development Manager, **TechRules**
- **D.P. Kruyswijk**, Digital Finance Strategist, **Virtual Affairs**

15:40-16:00  **Networking Coffee Break – Century Foyer**
SESSION FOUR: Future Focus - Private Banking in Switzerland in 2017 and Beyond

Chairperson: Ian Woodhouse, Director, PwC

16:00-16:20 Key Future Developments in Private Wealth
- The challenges boutique banks and family offices face in Switzerland
- Impacts of regulation, technology and the evolving customer
- Defining best practices for sustained success

Ray Soudah, Chairman & Founding Partner, MilleniumAssociates AG

16:20-16:40 Maintaining Switzerland’s Reputation as a Key Wealth Hub
- Identifying potential future challenges
- Being strategic and tactical in catering to local and international wealth
- How Switzerland can maintain its one-of-a-kind allure as a private banking centre
- Understanding Switzerland’s unique position as a global wealth hub – still number one?

Gavin Rankin, Head of Managed Investments, Citi Private Bank, EMEA

16:40-17:20 Expert Panel: Where is Swiss Private Banking Now and Where Does it Need to be Tomorrow?

Experts from private banks, family offices and consultants will discuss and debate how Switzerland can remain a key player in the industry

Discussion points include:
- How can the rest of Europe learn from Switzerland?
- How will private banking hubs be affected by Brexit
- Lessons learned and key takeaways from today’s presentations
- Building a roadmap for 2017 and beyond

Panellists include:
- Jürg Hunziker, Group Chief Markets Officer and Deputy Group CEO, Avaloq
- Gavin Rankin, Head of Managed Investments, Citi Private Bank, EMEA
- Roger Lehmann, Business Head Switzerland, Member of the Executive Committee, HSBC Private Bank
- Ray Soudah, Chairman & Founding Partner, MilleniumAssociates AG
- Tobias Wagner, Head of Zurich Branch & Member of the Executive Committee, Societe Generale Private Banking Switzerland
- Jacqui Cheshire, Partner & Head of Family Office (Switzerland), Stonehage Fleming

17:20-17:30 Closing Remarks, Close of Conference followed by Drinks Reception – Century Foyer

19:00 Gala Dinner and Awards Ceremony – The Century

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