

08:00-09:00 Registration & Welcome Refreshments

09:00-09:10 **Welcome Address: Ronan McCaughey**, Editor, **Private Banker International**PRIVATE BANKER
INTERNATIONAL**SESSION ONE: New Dawn for Germany as the Leading Euro Wealth Centre****Chairperson: Ronan McCaughey**, Editor, **Private Banker International**PRIVATE BANKER
INTERNATIONAL09:10-09:30 **The next Wave in Wealth: How Private Banks Should Look Ahead to the Next UHNWI**

- How women, millennials and generation Z view private banks
- Knowing tomorrow's wealthy and making sure they know you
- How data can play its part

**Oliver Williams**, Head and Co-Founder, **WealthInsight**

WEALTHINSIGHT

09:30-09:50 **What Markets Await Private Banking Clients in 2018?**

- State of the market in Europe following US elections: the Trump Effect and Brexit – what we know so far
- The outlook for M&A and the financial section as QE winds down
- Risks to watch for and strategies to deal with them

**David Stubbs**, Head of Client Investment Strategy for EMEA, **J.P. Morgan**

J.P.Morgan

09:50-10:10 **The Old Versus the New – Established Wealth Hub or Innovative Wealth Centre?**

- What does the new competition look like?
- How is the industry adapting to new reality?
- Remaining competitive in a challenging market

**Christof Roßbroich**, Head of Sales Germany, **Avaloq**avalog
essential for banking

10:10-10:40 Speaker discussion and Q&A

*Moderated by Ronan McCaughey, Editor, Private Banker International**Speakers joining:***Christof Roßbroich**, Head of Sales Germany, **Avaloq****David Stubbs**, Head of Client Investment Strategy for EMEA, **J.P. Morgan****Oliver Williams**, Head and Co-Founder, **WealthInsight**avalog
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WEALTHINSIGHT

10:40-11:10 Mid-Morning Refreshments

SESSION TWO: Digital Disruption and Rise of FinTechs

11:10-11:15 **Chairperson: Ronan McCaughey, Editor, Private Banker International**PRIVATE BANKER
INTERNATIONAL11:15-11:35 **Case Study: Making Banking Simple with Primegate**

- Key features of Primegate
- What can Primegate offer the financial services industry?
- Enhancing the customer experience

**Martin Weibeler**, Vice President, Senior Product Manager Primegate,
Commerzbank AG

COMMERZBANK

11:35-11:55 **Scaling High Tech and High Touch Advice for Wealth Management Firms**

- Building a professional digital reputation for wealth relationship managers at scale
- Increasing relevant digital touchpoints of relationship managers with their key connections
- Amplify brand awareness of wealth firms in a data-driven and sustainable way through sales

**Guerson Meyer**, Sales Director, **Hearsay Systems** **h hearsay**
SYSTEMS11:55-12:15 **Digital Portfolio Management Technology for Robo and Personal Advice**

- Is going digital just a trend or will it push the boundaries in wealth management?
- Which technological abilities will deliver a sustainable impact on various business models?
- Will the future be 'best-of-breed' or 'one fits all'?

**Mario Alves**, Head of Sales and Partner Management, **aixigo** **aixigo**
einfach. besser. beraten.12:15-12:45 **Speaker discussion and Q&A***Moderated by* **Ronan McCaughey**, Editor, **Private Banker International**PRIVATE BANKER
INTERNATIONAL*Speakers joining:***Mario Alves**, Head of Sales and Partner Management, **aixigo** **aixigo**
einfach. besser. beraten.**Martin Weibeler**, Vice President, Senior Product Manager Primegate,
Commerzbank AG

COMMERZBANK

**Maryam Danesh-Kajouri**, Global Head of Product Marketing, **Crealogix**

ELAXY. | CREALOGIX

Guerson Meyer, Sales Director, **Hearsay Systems** **h hearsay**
SYSTEMS12:45-13:45 **Networking Lunch**

SESSION THREE: Technology Innovations in Wealth Management

13:45-13:50 **Chairperson: Oliver Williams**, Head and Co-Founder, **WealthInsight**[WEALTHINSIGHT](#)13:50-14:10 **Artificial Intelligence in Wealth Management**

- Waves of adoption of AI in banking
- What AI means for a private bank
- The good and bad of embracing AI
- What has Citi Private Bank already done and what is it doing now?
- Which applications provide best value for clients?

**Dr. Riccardo Pianeti**, Portfolio Engineer, Vice President, **Citi Private Bank**14:10-14:30 **Steering the Private Bank Through Better Data Analysis Insight**

- Challenges in the highly regulated environment
- New trends in data management and the advantages
- Use cases to drive businesses with strong data analytics

**Daniel Salinger**, Country Manager Germany, **Orbium**14:30-14:50 **Constant Change is the New Normal: FinTech Start-Up Case Study**

- The challenges faced when starting a business in a digital era
- What are the new products and service models required?
- How can start-ups compete within the wealth management market?
- What challenges need to be overcome to ensure the success of start-ups?

**Stephan Simmang**, Chief Technology Officer, **FinTech Group AG**

fintechgroup bank

14:50-15:20 **Speaker discussion & Q&A***Moderated by **Oliver Williams**, Head and Co-Founder, **WealthInsight***[WEALTHINSIGHT](#)*Speakers joining:***Dr. Riccardo Pianeti**, Portfolio Engineer, Vice President, **Citi****Stephan Simmang**, Chief Technology Officer, **FinTech Group AG****Daniel Salinger**, Country Manager Germany, **Orbium**

fintechgroup bank

15:20-15:50 **Mid-Afternoon Refreshments**

SESSION FOUR: The Future Evolution of the Industry

15:50-15:55 **Chairperson: Ian Woodhouse**, Head of Strategy and Change, **Orbium**15:55-16:15 **The Digital Future of Wealth Management**

- Are FinTechs really disrupting?
- Hybrid, omnichannel banking as the future for advisor-client interaction
- Goal based financial planning is the best translation of MiFID requirements

**Ton Kentgens**, Head of Global Business Development, **Ortec Finance**16:15-16:45 **Closing Debate***Discussion points to include:*

- What are the changing client dynamics in the German market?
- What are the evolving products and solution trends?
- What will be the impact of new technologies?
- How will banks work more with partners going forward?
- How will banks rebalance their business models and what are the main barriers to change?

*Moderated by Ian Woodhouse*, Head of Strategy and Change, **Orbium***Speakers joining:***Thorsten Heidt**, Managing Director, Divisional Head Corporate & Institutional Sales D/A/CH, **Commerzbank AG****Ton Kentgens**, Head of Global Business Development, **Ortec Finance**16:45-16:50 Closing Remarks: **Ronan McCaughey**, Editor, **Private Banker International**

16:50 Close of Conference

16:50-19:00 Private Banker International Awards, Drinks Reception and Canapes