Private Banking & Wealth Management: London
7th June 2018

08:00-09:00	Registration & Welcome Refreshments
09:00-09:10	**Welcome Address: Ronan McCaughey,** Editor, **Private Banker International**

SESSION ONE: Evolving Private Banking and Wealth Management

Chair: Ronan McCaughey, Editor**, Private Banker International**

09:10-09:30 **Maintaining London's Status in 2018**

- An international view on private banking and wealth management in London
- How to be in a position to lead the industry by mastering change
- How will Brexit impact private wealth?
- Finding the balance between private banking and wealth management

Paul Kearney, Managing Director, **Kleinwort Hambros**

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 rising rates– what we know so far
- The outlook for the markets 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 Private Bank**

09:50–10:10 **Bringing Investment Banking to the World's Wealthy**

- Providing wealth management with strong investment banking capabilities
- Creating investment products tailored to the needs of wealthy private clients
- A growing interest in structured products among an increasingly entrepreneurial clientele

Christian Berchem, CEO, **Credit Suisse UK**

10:10-10.40 Speaker discussion and Q&A

Paul Kearney, Managing Director, **Kleinwort Hambros**

Christian Berchem, CEO, **Credit Suisse UK**

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

10:40-11:10 Networking Coffee Break

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SESSION TWO: Meeting The New Demands of Clients

11:10-11:15 **Chair: Caroline Burkart,** Director, **Scorpio Partnership**

scorpiopartnership what wealth needs next

11:15-11:35 **What is the Digital Future in 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, Global Business Development Private Client Solutions, **Ortec Finance**

11:35-11:55 **Towards New Levels of Operational Excellence in Private Banking and Wealth Management – the Transformation Imperative**

- Findings from the Orbium Wealth Management C-Level Survey
- The challenges of digital transformation in an analogue business
- Towards the future

Alistair Shipp, Associate Partner and Head of Management Consulting Services, **Orbium UK**

11:55-12:15 **Providing a Modern Wealth Management Service**

- The drivers for a new investment approach
- The fundamentals you need to know when introducing a modernised service
- The importance of flexibility and customisation to meet clients' individual needs
- How to provide a top quality service in our newly technology-driven world

Yariv Haim, Founder, **Sparrows Capital**

12:15-12:35 **How to Create an Intimate Digital Banking Experience**

- Engaging investors on their channels of choice
- Using technology to create personalized offerings
- Creating meaningful micro-moments of engagement along the full client lifecycle
- Mastering regulatory compliance all along

Stephen Manly, Sales Director UK, **Appway**
Alessandro Tortelli, Solutions Consultant, **Appway**

12:35-13:05 Speaker discussion and Q&A

Ton Kentgens, Global Business Development Private Client Solutions, **Ortec Finance**

Alistair Shipp, Associate Partner and Head of Management Consulting Services, **Orbium UK**

Yariv Haim, Founder, **Sparrows Capital**

Stephen Manly, Sales Director UK, **Appway**

13:05-14:05 Networking Lunch

The CPD Certification Service

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SESSION THREE: New Models of Success in a Changing Landscape

14:05-14:10 **Chair: Shailen Patel,** Director, Wealth and Asset Management, **Ernst & Young**

14:10-14:30 **Why We Need to Get Better at 'Giving' Advice**

- The increasing importance of discussing philanthropy with clients
- The opportunities and challenges for advisers

Rachel Harrington, Director, **Coutts Institute**

14:30-14:50 **Building a World Class Customer Experience**

- How are private banks adapting to suit the evolving needs of the client
- Moving in to the digital era, how are private banks interacting with clients through technology

James Heddle, UHNW, UK Team Head, **Citi Private Bank**

14:50-15:10 **Are Traditional Private Banking Virtues the New Thing?**

- Everything is changing faster than ever - or is it?
- What do private banking clients really expect in the future?

Martin G. Schuricht, Managing Director, **Nykredit Private Banking**

15:10-15:30 **Driving Field Productivity, Corporate Visibility, and Client NPS**

- The four critical pillars of advisor productivity
- Enabling advisors to be high-touch at scale
- Automation, compliance and data-driven approach

Lucas Wilkens, Managing Director, EMEA, **Hearsay Systems**

15:30-16:00 Speaker discussion and Q&A

Rachel Harrington, Director, **Coutts Institute**

Martin G. Schuricht, Managing Director, **Nykredit Private Banking**

Lucas Wilkens, Managing Director, EMEA, **Hearsay Systems**

James Heddle, UHNW, UK Team Head, **Citi Private Bank**

16:00-16:30 Networking Coffee Break

SESSION FOUR: Evolution of Private Banking & Wealth Management

Chair: Ian Woodhouse, Head of Strategy and Change, **Orbium**

16:30-17:00 Family Office Panel: Successfully Managing Family Wealth Across the Generations

- The need to understand family values and missions
- The importance of social and environmental impact to investment decisions
- The key to maintaining the trust and return of the customers
- The rise of alternative investment approaches including direct and co-investments
- Intergenerational transfer of family wealth

Dominik Von Eynern, Partner, **Blu Family Office**

Antonio Curia, Executive Director, **Wimmer Family Office**

Colin Melvin, Founder and Managing Partner, **Arkadiko Partners**

Inno van den Berg, CIO, **Victoria Private Investment Office**

17:00-17:30 Expert Panel: Ensure Lasting Success - How Will the Industry Change and Develop over Time?

- London's position going forward and what does it stand to lose?
- How can private banks and wealth managers ensure equal diversity and inclusion?
- How well are private banks/wealth managers meeting changing client needs?
- Which technologies will be important going forward?
- How are private banks and wealth managers managing the regulations?

Jeremie Vuillard, Group Head of Advisory, **Kleinwort Hambros**

Martin G. Schuricht, Managing Director, **Nykredit Private Banking**

Christopher Rossbach, CIO, **J. Stern & Co.**

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

James Heddle, UHNW, UK Team Head, **Citi Private Bank**

17:30-17:40	Closing Remarks
19:00-22:30	Private Banker International Gala Dinner and Awards