

08:00-09:00 Registration & Welcome Refreshments

09:00-09:10 **Welcome Address: Ronan McCaughey, Editor, Private Banker International**

PRIVATE BANKER
INTERNATIONAL

SESSION ONE: The Private Banking Landscape In Europe – A View from Switzerland



Chairperson: Ronan McCaughey, Editor, Private Banker International

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09:10-09:30 **Switzerland at the Forefront of the Private Banking World**



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

J.P. Morgan

09:30-09:40 **Q&A with David Stubbs**

09:30-09:50 **The Importance of Data in Digital Banking**

- Data needs to deliver digital banking services
- Data collection and storage
- Is the industry ready?



Tobias Unger, CEO, Avaloq Sourcing, Switzerland & Liechtenstein

avaloloq
essential for banking

09:50-10:10 **Digital Disruption that Banks are Facing**

- Where is Citi Private Bank in the disruption cycle?
- Can banks have innovation *and* scale?
- How can banks improve their efficiency?
- Can incumbents in US and Europe embrace innovation?
- How are banks embracing innovation to augment the client experience?



Philip Watson, Managing Director, Head of Global Investment Lab, Citi Private Bank

citi
Private Bank

10:10-10:30 **Do we Need Artificial Intelligence in Wealth Management?**

- The latest robo-advisors, chatbots and AI
- Reaching Goal based targets
- Enhancing the customer experience



Andrzej Przewięźlikowski, Vice President, Director of Financial Services Division, Comarch

COMARCH

10:30-11:00 **Speaker discussion & Q&A**

Moderated by Ronan McCaughey, Editor, Private Banker International

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Speakers include:

Tobias Unger, CEO, Avaloq Sourcing, Switzerland & Liechtenstein

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Philip Watson, Managing Director, Investment Lab Management, Citi Private Bank

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Andrzej Przewięźlikowski, Vice President, Director of Financial Services Division, Comarch

COMARCH



Tobias Christen, CEO, DSwiss AG

DSwiss
SECURE DIGITAL SERVICES

11:00-11:30 Networking Coffee Break

SESSION TWO: Capitalising On Fast Growing Market Segments in the Swiss Market



Chairperson: Oliver Williams, Head & Co-Founder, **WealthInsight**

WEALTHINSIGHT

11:30-11:50

Sustainable and Responsible Investments: Driving Purpose and Performance

- Gathering momentum: evolution and challenges of sustainable investing
- Enhance shareholder value with responsible corporate practices
- Investing with BNP Paribas a committed and responsible bank



Hubert Musseau, CEO Wealth Management in Switzerland and Emerging Markets, **BNP Paribas**



BNP PARIBAS

11:50-12:10

Can Innovative Technology Determine the Regulatory Future?

- How can RegTech manage compliance risks?
- What are the risks of jumping on the RegTech bandwagon?
- Meeting the demands of a broad client base
- What can RegTech offer the financial services industry?



Guenther Dobrauz, Partner, Leader PwC Legal Switzerland, **PwC**



12:10-12:30

Combining the Advantages of Swiss Private Banking with Modern Wealth Management

- Expanding client offering with innovative investment solutions
- Successfully matching client risk profiles
- Providing relevant and effective solutions to create value



Luc Filip, Head of Discretionary Portfolio Management and Wealth Management Investments, **Banque SYZ**

SYZ WEALTH MANAGEMENT

12:30-12:50

Société Générale: A Family Office Point of View



Tobias Wagner, Head of Zurich Branch & Member of the Executive Committee, **Societe Generale Private Banking Switzerland**

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Private Banking

12:50-13:20

Speaker discussion and Q&A

Moderated by Oliver Williams, Head & Co-Founder, WealthInsight

WEALTHINSIGHT

Speakers include:

Luc Filip, Head of Discretionary Portfolio Management and Wealth Management Investments, **Banque SYZ**

SYZ WEALTH MANAGEMENT

Hubert Musseau, CEO Wealth Management in Switzerland and Emerging Markets, **BNP Paribas**



BNP PARIBAS

Representative, Millennium Banque Privée

Millennium
banque privée

Guenther Dobrauz, Partner, Leader PwC Legal Switzerland, **PwC**



Tobias Wagner, Head of Zurich Branch & Member of the Executive Committee, **Societe Generale Private Banking Switzerland**

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13:20-14:20

Networking Lunch

SESSION THREE: Enhancing Client and Advisor Relationships

Chairperson: **Ulrich Knopp**, Partner, **MilleniumAssociates**

millenium
associates

14:20-14:50 **The Emerging Digital Advisor**

- How can a digital advisor enhance advisor-client management?
- Providing a hybrid offering to existing clients
- Attracting a new client base
- Prioritising and establishing a security strategy to keep clients safe

Representative, **Finantix**

Finantix

14:50-15:10 **What is the Future for Advisory Services?**

- Trends in wealth management: the world is changing – wealth managers have to adapt
- Understanding the key challenges in wealth management
- How to provide state of the art advice and exceed the clients expectations



Nicolas de Skowronski, Deputy Head of Advisory Solutions, **Julius Bär**

Julius Bär

15:10-15:30 **Digitisation in Private Banking and Wealth Management**

Mahesh Bulchandani, CEO, Asia Pacific Operations, **FinIQ Consulting**

FinIQ

15:30-15:50 **The Rise of FinTechs and RegTech Startups in Swiss Private Banking**

- Orbium's experience in innovation and the ecosystem
- Introducing our startups partnerships
- A view on how the future might evolve



Olivier Schneider, Partner, **Orbium**

orbium

15:50-16:10 **Speaker discussion and Q&A**

Moderated by Ulrich Knopp, Partner, MilleniumAssociates

Speakers include:

Representative, **Finantix**

Mahesh Bulchandani, CEO, Asia Pacific Operations, FinIQ Consulting

Nicolas de Skowronski, Deputy Head of Advisory Solutions, **Julius Bär**

Olivier Schneider, Partner, **Orbium**

John Davies, Chairman, **Kompli Global**



millenium
associates

Finantix
FinIQ

Julius Bär
orbium

kompli-global
in association with
CAPCO

16:10-16:30 **Networking Coffee Break**

SESSION FOUR: Future Perspectives – Building A Roadmap Beyond 2017



Chairperson: Ian Woodhouse, Senior Business Advisor, **Orbium**



16:30-16:50

Providing Tailored Solutions to UHNWI Clients

- Being strategic and tactical in catering to local and international wealth
- Innovative strategies for successful client onboarding
- The key to maintaining the trust and return of the customers long term

16:50-17:20

Expert Panel: Where is Private Banking Now and Where will it be by 2030?

Private Banking experts will discuss and debate for or against Brexit, and the future of private banking in Switzerland and beyond

Discussion points will include:

- Identifying new areas of alternative investments
- Switzerland's status as an international wealth management hub
- The future of asset allocation and goal based planning
- Will A.I and robo-advisors become the new norm?
- How far will technology go within the family office?
- Exploring growth within the impact investment market
- How will the lack of direct access to foreign markets affect Swiss private banking?

Moderated by Ian Woodhouse, Senior Business Advisor, Orbium

Speakers include:



Michael Rogenmoser, General Manager Switzerland & Liechtenstein, **Avaloq**



Mahesh Bulchandani, CEO, Asia Pacific Operations, **FinIQ Consulting**



Ekaterina Mavrenkova, Managing Partner, **Henley & Partners**



Alexander Sabo, Market Head, Managing Director, Multi Family Offices, **HSBC**



Tobias Wagner, Head of Zurich Branch & Member of the Executive Committee, **Societe Generale Private Banking Switzerland**



17:20-17:30

Closing Remarks and Close of Conference

18:30-22:00

Private Banker International Gala Dinner and Awards