

27th Annual
Private Banker International
Global Wealth Summit
and Awards 2017

FRIDAY 13TH OCTOBER 2017, SINGAPORE



Supporting the sector in differentiating proposition, navigating digital integration and securing engagement from future customers

The 2017 Summit will bring together industry thought leaders to delve into core themes including proposition differentiation in the face of new disruptive competitors, customer engagement now and in the transfer of wealth, practical digital integration all in the setting of regulatory compliance.

2017 Speaking Faculty

Ronan McCaughey, Editor, Private Banker International

Tan Su Shan, Group Head, Consumer Banking and Wealth Management, DBS

Michelle Lau, Head of Private Wealth Solutions for South East Asia, HSBC Private Banking

Sanjoy Sen, Managing Director, Retail & Wealth Asia, ANZ

Bassam Salem, CEO Asia Pacific, Citi Private Bank

Ketan Samani, Chief Digital Officer APAC, UBS Wealth Management

Gerald Mackenzie, Director, Innovation and Business Transformation, Credit Suisse

Savita Bedi, Managing Director, Deutsche Private Bank

Asheesh Chanda, Founder, Kristal.AI

Urs Lichtenberger, Director, Client Platform, Asia Pacific, Credit Suisse

Rana Peries, Director, Innovation & Digital, Barclays

Mark Smallwood, Managing Director, Confidentem Private Office

Rohit Bhuta, Chief Executive Officer, Crossinvest

Dominic Volek, Managing Partner, Head Southeast Asia, Henley & Partners

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Friday 13 th October 2017	
8:00 – 8:50	Registration & refreshments
8:45 – 8:55	Chair opening remarks <i>Ronan McCaughey, Editor, Private Banker International</i>
8:55 – 9:00	<u>Lead Partner Opening Remarks</u> <i>Delivered by BNP Paribas</i>
9:00 – 9:45	<u>Opening CEO Panel</u> Identifying and tackling implications of changing demographics within your wealth portfolio to deliver an optimal service to your clients now and in 2030 <ul style="list-style-type: none"> • Identifying your role in engaging the first and second generations to decipher adaptations needed in approach to reach clients new and old • Considering expectations on communication and exploring how this has changed in recent years to define a strategy for a more modern and digitally engaged channel • Looking to planning and estate management to identify differing needs and expectations as the family transfer wealth • Exploring different family dynamics to ascertain whose interests are of importance now and how this may continue to shift moving forwards • Tackling the talent gap to secure leading talent and protect your investments to build a committed workforce <u>Panellists:</u> <i>Michelle Lau, Head of Private Wealth Solutions for South East Asia, HSBC Private Banking</i> <i>Sanjoy Sen, Managing Director, Retail & Wealth Asia, ANZ</i> <i>Bassam Salem, CEO Asia Pacific, Citi Private Bank</i>
9:45 – 10:05	<u>Session reserved for BNP Paribas</u>
10:05 – 10:50	<u>Panel Discussion</u> Navigating your proposition and product differentiation to ensure you build a competitive landscape which ensures maximum return <ul style="list-style-type: none"> • Ascertaining your client trust level to determine whether you are able to successfully shift their expectations in line with new product options

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	<ul style="list-style-type: none"> • Assessing the role of socially responsible investments to ascertain where clients' needs and expectations lie ensuring you build personalised portfolios • Integrating analytics and data-driven technology innovations into your operations to build more personalised services to better tailor propositions and products to your clients expectations to enforce client loyalty • Deciphering further innovations to be made in client facing technology and strategy to maintain client engagement and loyalty while reducing costs associated with high volume, low return client interactions <p><u>Panellists:</u></p> <p><i>Mark Smallwood, Managing Director, Confidentem Private Office</i> <i>Rohit Bhuta, Chief Executive Officer, Crossinvest</i> <i>Dominic Volek, Managing Partner, Head Southeast Asia, Henley & Partners</i></p>
10:50 – 11:20	Refreshments & networking
11:20 – 12:00	<p><u>Keynote CEO Conversation</u></p> <p><i>Join the Group Head, Consumer Banking and Wealth Management of the leading International Bank DBS to hear the latest innovations achieved by the bank to make great strides in digital.</i></p> <p><i>The session will open with a short opening presentation, followed by a fireside interview covering:</i></p> <ul style="list-style-type: none"> • The progress of DBS in Digital Transformation and Integration for Wealth Management • The challenges encountered in delivering digital services to determine DBS success • The roadmap for the future of digital innovation – deciphering where next for DBS and the Wealth industry <p><i>Tan Su Shan, Group Head, Consumer Banking and Wealth Management, DBS</i></p>
12:00 – 12:30	<p><u>Keynote Presentation</u></p> <p><i>Bassem Salem is a leading figure in the Private Banking industry and with his 30 years of experience of Private Banking and asset management he holds overall responsibility for the Private Bank's activities across Asia. Citi Private Bank's Asia Pacific operation is dedicated to serving ultra-high net worth clients across 13 countries, and Bassam will add a unique and highly informed perspective to the Opening CEO Panel.</i></p>

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	<p><i>Bassem will be delivering a Keynote presentation sharing his extensive experience and expertise in the realm of Private Banking.</i></p> <p><i>Bassam Salem, CEO Asia Pacific, Citi Private Bank</i></p>
12:30 – 13:30	Lunch
13:30 – 14:00	<p><u>Keynote Presentation</u></p> <p>Sharing a successful case of digital transformation – how we got here and where to next</p> <ul style="list-style-type: none"> • Establishing an initial strategy for approaching your digital journey to set off on the right foot • Building recognition of your client needs for human vs digital and weighing the return to establish where your digital journey should begin • Identifying available technology and support to build profitable and beneficial partnerships • Sharing the case of Credit Suisse to realise their transformation successes and determine the next steps for continued profitable investments <p><i>Gerald Mackenzie, Director, Innovation and Business Transformation, Credit Suisse</i></p>
14:00 – 14:45	<p><u>Panel Discussion</u></p> <p>Deciphering Digital Transformation – how late is too late?</p> <ul style="list-style-type: none"> • Establishing the need for digital integration of services to ensure continued profitability • Exploiting experience of those who have been before to begin your journey with intellectual capital and ensure you utilise all available resources • Considering your client needs and expectations to establish a strategy for easing into digital • Don't get left behind – hearing tips and tricks from digital innovators to build awareness of successful digital client engagement <p><u>Panellists:</u> <i>Ketan Samani, Chief Digital Officer APAC, UBS Wealth Management</i> <i>Asheesh Chanda, Founder, Kristal.AI</i> <i>Urs Lichtenberger, Director, Client Platform, Asia Pacific, Credit Suisse</i> <i>Rana Peries, Director, Innovation & Digital, Barclays</i></p>

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14:45 – 15:30	<p><u>Workshop Discussion</u></p> <p>Digital Transformation – discussing technology available and established strategies for digital engagement without client dissatisfaction</p> <p><i>The final session of the day will offer delegates the unique opportunity to come together with your peers and share thoughts and develop strategies to a key industry question facing the wealth management industry. Hosted by an industry expert and focused on this single issue, the workshop discussion is an exciting, interactive way to build your personal network and learn from the experiences and expertise of others.</i></p> 
15:30	<p>Chair summation Ronan McCaughey, Editor, Private Banker International</p>

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Awarding the leading Global Private Banks and Wealth Management Companies

Private Banker International Global Wealth Summit and Awards brings together the worldwide leading Private Banks and Wealth Management companies to address key industry issues in the daytime Summit and celebrate the leading sector initiatives in the evening during an Awards Gala dinner.

Friday 13th October 2017	
18:30 – 19:10	Registration & Awards Dinner Cocktail Reception
19:10	All Guests to be Seated
19:20 – 19:30	Welcome Address
19:30 – 20:10	Dinner Commences
20:10 – 20:40	Awards Presentation 1: Institutional Awards <ul style="list-style-type: none">▪ Outstanding Private Bank – North Asia▪ Outstanding Private Bank – South Asia▪ Outstanding Private Bank – Southeast Asia▪ Outstanding Private Bank – Asia Pacific Regional Player▪ Outstanding Global Private Bank – Asia Pacific▪ Outstanding Global Private Bank – Europe▪ Outstanding Global Private Bank – North America▪ Outstanding Global Private Bank – Latin America▪ Outstanding Global Private Bank – Middle East▪ Outstanding Global Private Bank – Africa▪ Outstanding Global Private Bank (Overall)
20:40 – 21:05	Dinner Continues

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<p>21:05 – 21:35</p>	<p>Service Proposition Awards</p> <ul style="list-style-type: none"> ▪ Outstanding Wealth Management Service for the Affluent ▪ Best Family Office Offering ▪ Best Next-Generation Offering ▪ Outstanding Private Bank for UHNW Clients ▪ Outstanding Philanthropy Offering ▪ Outstanding NRI/Global Indians Offering ▪ Best Discretionary & Advisory Service Offering ▪ Most Effective Investment Service Offering ▪ Outstanding Wealth Planning and Trust Provider
<p>21:35 – 21:50</p>	<p>Dinner Serves</p>
<p>21:50 – 22:30</p>	<p>Strategy Awards</p> <ul style="list-style-type: none"> ▪ Outstanding Wealth Manager-Customer Relationship Service and Engagement ▪ Outstanding Private Bank for growth strategy – Organic ▪ Outstanding Private Bank for growth strategy – M&A ▪ Outstanding Wealth Management Technology Initiative – Front End ▪ Outstanding Wealth Management Technology Initiative – Back Office ▪ Most Innovative Digital Offering ▪ Most Innovative Business Model <p>People Awards</p> <ul style="list-style-type: none"> ▪ Outstanding RM Training and Development Programme ▪ Outstanding Young Private Bankers ▪ Outstanding Private Banker – Asia Pacific ▪ Outstanding Global Private Banker ▪ Rising Star for Asia-Pacific
<p>22:30</p>	<p>Closing Address</p>