

08:00-09:00	Welcome refreshments and registration
09:00-09:10	Chair's opening remarks: Oliver Williams, Editor, Private Banker International
SESSION ONE: A question of traditions?	
09:10-09:30	<p>OPENING ADDRESS: State of the Private Banking Industry</p> <ul style="list-style-type: none"> Challenges and key success factors for agenda 2020+ Swiss Private Banking in a state of flux – an opportunity? Winners and Losers in wealth management's new era <p>Tobias Wagner, Head of Zurich Branch & Member of the Executive Committee, Société Générale Private Banking Switzerland</p> 
09:30-09:50	<p>Leveraging ecosystems to succeed in Digital Private Banking</p> <ul style="list-style-type: none"> Digital Private Banking – where are we today Ecosystems as driver for innovation Key success factors in digital banking <p>Michael Rogenmoser, Chief Market Officer Switzerland & Liechtenstein, Avaloq</p> 
09:50-10:10	<p>Is there room for artificial intelligence in private banking?</p> <ul style="list-style-type: none"> A tailored relationship supported by algorithms Bringing commercial efficiency to new levels The AI-powered private banker <p>Salvador Vidal, Head of Marketing & Client Experience, BNP Paribas Wealth Management, Switzerland</p> 
10:10-10:30	<p>The digitalisation factor - questioning the traditional customer bank relationship and influencing the organisation and infrastructure</p> <ul style="list-style-type: none"> Going digital means addressing but also pushing needs, boosting customer interaction Fulfilling digital needs is a hygienic factor in private banking relationships Satisfaction depends on how "individualised" these needs will be addressed Being effective and efficient on that will need to question beloved traditions Technology should bridge the gap between the history and the future <p>Mario Alves, Head of Sales and Partner Management, Aixigo</p> 
10:30-11:00	<p>Panel Discussion: Forging a new tradition for Swiss Private Banking</p> <ul style="list-style-type: none"> What's the best strategy for serving today's wealthy customer? With technology playing an increasingly significant role in service delivery what benefit does institutional size confer? How can Switzerland's private banks forge a new model bridging the strengths of an established brand with the agility of leaner, digital-first providers? How should the market respond to the rise of the Millennial millionaire – and what can Switzerland's private banks do to attract them? <p>Moderator: Oliver Williams, Editor, Private Banker International Tobias Wagner, Head of Zurich Branch & Member of the Executive Committee, Société Générale Private Banking Switzerland Salvador Vidal, Head of Marketing & Client Experience, BNP Paribas Wealth Management, Switzerland Michael Rogenmoser, Chief Market Officer Switzerland & Liechtenstein, Avaloq Mario Alves, Head of Sales and Partner Management, Aixigo Silvan Schumacher, Co-Founder & CEO, Swanest</p>      
11:00-11:30	Networking Coffee Break

SESSION TWO: New Model Private Banking	
	<p>Chair's opening remarks</p>
11:30-11:50	<p>Re-positioning the private bank</p> <ul style="list-style-type: none"> The implications for service, delivery and product distribution in the age of the digital wealth manager Strategies for appealing to the millennial millionaire and getting ready for the end of private client loyalty <p>José Uribarri Soares, Head of IT Department, Millennium Banque Privée</p> 
11:50-12:10	<p>Getting to Wealth Management 4.0 – Towards new models of private banking and wealth management</p> <ul style="list-style-type: none"> Exploring insights from Orbium's C-Level Survey and exploring the views of 50 leading private banks and wealth managers across Europe and Asia on the current and future state of the industry A more dynamic industry presents tougher challenges and not all firms are well positioned Tougher cost and revenue pressures, but opportunities from addressing demographic, social shifts and better targeting of underserved client needs A more integrated approach will be needed across three key areas of client focus and service differentiation, agility and industrialization and new capabilities and channels Achieving successful change will require new skills and approaches <p>Zabeen Moser-Mawji, Partner, Orbium</p> 
12:10-12:30	<p>Private collaboration channels to fast-track financial transactions</p> <p>Leena Iyar, Head of Marketing, Moxtra Inc.</p> <p>Omar El Khamlichi, COO, Prosperity (an initiative of ABN AMRO)</p> 
12:30-13:00	<p>Panel Discussion: Re-defining Private Banking for the digital age</p> <ul style="list-style-type: none"> How should Switzerland's private banking industry define itself in the age of digital? What strategies are needed to respond to rapidly changing customer demographics and competitive pressures? What are the opportunities for driving crossborder business? What will the front office toolset look like in the future? What is the right balance between artificial automation and human empathy and what are the key constraints preventing Private Banks from achieving the ideal hybrid model? What opportunities does blockchain present in the future of Private Banking? KYC and AML: Establishing a single, digital identity using blockchain Increasing security, faster processes and cutting costs: Is automation by blockchain too good to be true? <p>Moderator: tbc</p> <p>Zabeen Moser-Mawji, Partner, Orbium</p> <p>Leena Iyar, Head of Marketing, Moxtra Inc.</p> <p>Omar El Khamlichi, COO, Prosperity (an initiative of ABN AMRO)</p> <p>José Uribarri Soares, Head of IT, Millennium Banque Privée</p> <p>Dominic Snell, Director of Consulting, Wealth Dynamix</p> 
13:00-14:00	<p>Networking lunch</p>

SESSION THREE: Investment Environment	
	<p>Chair's opening remarks:</p>
14:00-14:20	<p>Case Study: Automation experience at a large multinational private bank</p> <ul style="list-style-type: none"> • Multi-channel distribution, from UHNW to retail, on one single integrated platform • Multi-asset class deployment: Equity, FX, credit with potential to add funds, unit trusts, insurance policies • Life cycle management: Pre-trade checks, advisory, pricing, order management, order execution, post-trade processing • Multiple stake holders: Front office, product teams, middle office, compliance, audit all have their own specific views <p>Mahesh Bulchandani, CEO and Director, FinIQ Europe</p> 
14:20-14:40	<p>Built to last: Sharing the family vision across generations to secure succession</p> <ul style="list-style-type: none"> • Establishing a common purpose for the family's wealth and the Governance framework • Relentless communication between the family members to preserve alignment and minimise conflicts • Continuously working on conflict resolution to strengthen family ties <p>Jacqui Cheshire, Partner, Head of Family Office, Switzerland, Stonehage Fleming</p> 
14:40-15:00	<p>Disaggregation of the value chain in wealth management: how to keep technology in synch and why building blocks is the answer</p> <ul style="list-style-type: none"> • Technology at the service of the business – not the opposite! • The end of the monolithic private bank – welcome to ecosystem-based wealth management • How technology can help in this new model – the replacement of monolithic solutions with building blocks • The challenge (and opportunity) to keep it simple – how to approach the assembly of building blocks and the case for lower and better IT spending <p>Patrick Odoni, Director Sales & Marketing Switzerland, Capital Banking Solutions Christophe Brisson, Director Operations Europe, Capital Banking Solutions</p> 
15:00 -15:20	<p>The impact of making an impact – impact in and investing & ESG</p> <ul style="list-style-type: none"> • Understanding sustainability in terms of long-term value creation • Impact investing: what investors need to know on ESG • ESG label: opportunity or threat for impact-oriented millennial clients • Best practices and innovative strategies to integrating ESG <p>Joseph Oumarou, Assistant Vice President, Banque Cantonale de Genève; Professor of Finance, ISFB - Institut Supérieur de Formation Bancaire (Genève)</p> 
15:20-15:50	<p>Speaker Q&A and Panel Discussion: Moderator: tbc</p> <p>Joseph Oumarou, Assistant Vice President, Banque Cantonale de Genève; Professor of Finance, ISFB - Institut Supérieur de Formation Bancaire (Genève) Mahesh Bulchandani, CEO and Director, FinIQ Europe Patrick Odoni, Director Sales & Marketing Switzerland, Capital Banking Solutions Christophe Brisson, Director Operations Europe, Capital Banking Solutions</p>   
15:50-16:20	<p>Networking Coffee Break</p>

SESSION FOUR: Restoring The Lustre	
	<p>Chair's opening remarks: Ian Woodhouse, Head of Strategy and Change, Orbium </p>
16:20-16:40	<p>Topic tbc</p> <p>Andre Mueller, Practice Managing Director Wealth Management Services, Excelian Limited </p>
16:40-17:00	<p>The Importance of Data in Digital Banking</p> <ul style="list-style-type: none"> • Understanding your data to deliver better digital banking services • How to prepare your organisation for big data • Leveraging data to become a customer centric organisation • Maximise new and existing data to understand customer needs and predict future behavior • Utilising big data to bridge the gap between customer expectation and the business <p><i>Speaker tbc</i></p>
17:00-17:40	<p>Expert Panel: Where is Private Banking Now and Where will it be by 2030? <i>Private Banking experts will discuss the future of private banking in Switzerland and beyond as well as external perceptions of the Swiss market</i></p> <ul style="list-style-type: none"> • Maintaining Switzerland's status as an international wealth management hub • Strategies for winning customers and sizing up opportunities in current markets • Industry digitalisation - gearing up for a change of business models <p>Moderator: Ian Woodhouse, Head of Strategy and Change, Orbium Tobias Wagner, Head of Zurich Branch & Member of the Executive Committee, Societe Generale Private Banking, Switzerland Salvador Vidal, Head of Marketing & Client Experience, BNP Paribas Wealth Management, Switzerland Tobias Unger, Regional Manager Switzerland / Liechtenstein and Member of the Group Executive Board, Avaloq Gabriel Spirig, Head of Distribution & Business Development, Lombard International Assurance Andre Mueller, Practice Managing Director Wealth Management Services, Excelian Limited</p> <p> BNP PARIBAS    SOCIETE GENERALE  avalog  LOMBARD INTERNATIONAL ASSURANCE</p>
17:30-17:40	<p>Chair's closing remarks</p>
19:00	<p>Drinks Reception and Awards Gala Dinner</p>