

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>How a Swiss Private Bank adopted a WealthTech platform over time and will gain long term through a two speed architecture</p> <p><i>If going digital means change, which changes are most important?</i></p> <ul style="list-style-type: none"> Which kind of technology and which kind of partner are we looking for? Which project will be first and how can we not only use, but adopt and create? Going MVP in a bank is possible, but how? And why? The solutions roadmap – amazing things, done by ourselves. <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"> Where do we currently stand on previous predictions of PBI Switzerland? <ul style="list-style-type: none"> - Is Swiss private banking really in decline? - How close are robe-advisors and fintech to making the relationship manager redundant? Opinions on the future marriage of technology and private banking How demographics will change private banking: what the next generation want <p>Moderator: Oliver Williams, Editor, Private Banker International</p> <p>Tobias Wagner, Head of Zurich Branch & Member of the Executive Committee, Société Générale Private Banking Switzerland</p> <p>Salvador Vidal, Head of Marketing & Client Experience, BNP Paribas Wealth Management, Switzerland</p> <p>Michael Rogenmoser, Chief Market Officer Switzerland & Liechtenstein, Avaloq</p> <p>Mario Alves, Head of Sales and Partner Management, Aixigo</p> <p>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: Vivek Kapoor, Private Banker (VP) , Credit Suisse</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> <p><i>Orbium provides an insight to the current state and future evolution of the industry:</i></p> <ul style="list-style-type: none"> The landscape is evolving with tough challenges and not all industry participants are well positioned There are strong cost and revenue pressures but opportunities exist in addressing demographic social shifts and better targeting underserved client need Many will underperform and not all will survive but the C-Suite sees opportunity for those that can deliver more balanced and integrated business models <p>Zabeen Moser-Mawji, Partner, Orbium</p> 
12:10-12:30	<p>Private collaboration channels to fast-track financial transactions</p> <p><i>Today's banking customers expect powerful, on-demand digital experiences from their financial services providers. Learn how Moxtra and ABN AMRO's Prosperity have partnered to deliver a next-gen customer engagement experience, by providing a private collaboration channel to accelerate transactions & deepen customer relationships.</i></p> <p>Kartik Chillakantin, Solutions Lead, Moxtra Andrew Trythall, Product Owner, Prosperity</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: Vivek Kapoor, Private Banker (VP) , Credit Suisse Zabeen Moser-Mawji, Partner, Orbium Omar El Khamlichi, COO, Prosperity (an initiative of ABN AMRO) José Uribarri Soares, Head of IT, Millennium Banque Privée Dominic Snell, Director of Consulting, Wealth Dynamix</p>      
13:00-14:00	<p>Networking Lunch</p>
<p>SESSION THREE: Investment Environment</p>	
	<p>Chair's opening remarks: Oliver Williams, Editor, Private Banker International</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: Oliver Williams, Editor, Private Banker International 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>
<p>SESSION FOUR: Restoring The Lustre</p>	
	<p>Chair's opening remarks: Ian Woodhouse, Head of Strategy and Change, Orbium</p> 
16:20-16:40	<p>Hybrid Advice and Open Banking: A journey towards frictionless wealth management and private banking</p>

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	<ul style="list-style-type: none"> • What is Hybrid Advice • What opportunities does it create for private banks? • How does Hybrid Advice relate to Open Banking? • What could the future look like <p>Hassan Suffyan, Head of UK Wealth Practice, Excelian Limited</p>	
16:40-17:20	<p>Expert Panel: Where is private banking now and where will it be by 2030?</p> <ul style="list-style-type: none"> • Strategies for winning customers and sizing up opportunities in current markets • Industry digitalisation - gearing up for a change of business models • Maintaining Switzerland's status as an international wealth management hub <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 Hassan Suffyan, Head of UK Wealth Practice, Excelian Limited</p>	     
17:20-17:30	<p>Chair's closing remarks: Ian Woodhouse, Head of Strategy and Change, Orbium</p>	
19:00	<p>Drinks Reception and Awards Gala Dinner</p>	