

08:00-09:00	Welcome refreshments and registration
09:00-09:10	Chair's opening remarks: Oliver Williams, Head & Co-Founder, Wealth Insight
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> <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>Representative, 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>Tobias Wagner, Head of Zurich Branch & Member of the Executive Committee, Société Générale Private Banking Switzerland Representative, BNP Paribas Wealth Management, Switzerland Michael Rogenmoser, Chief Market Officer Switzerland & Liechtenstein, Avaloq Mario Alves, Head of Sales and Partner Management, Aixigo</p>    
11:00-11:30	Networking Coffee Break

SESSION TWO: New Model Private Banking	
	Chair's opening remarks
11:30-11:50	<p>Re-positioning the private bank - topic tbc</p> <ul style="list-style-type: none"> The implications for service, delivery and product distribution in the age of the digital wealth manager Driving diversity into relationship management Strategies for appealing to the millennial millionaire and getting ready for the end of private client loyalty <p>Representative, Millennium Banque Privée</p> 
11:50-12:10	<p>Lean In: Building the agile wealth manager – topic tbc</p> <ul style="list-style-type: none"> How can wealth management firms make greater use of digital technology to drive institutional agility while meeting service expectations for wealthy clients? What does the hybrid-human model look like? What are the touchpoints where technology works best and humans work better? What role can technology play in matching standardisation with a reputation for personalised service <p>Zabeen Moser-Mawji, Partner, Orbium</p> 
12:10-12:30	<p>Accelerate Banking Transactions in the Mobile Era – topic tbc</p> <p>Representative, Moxtra</p> 
12:30-13:00	<p>Panel Discussion: Re-defining Swiss 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? The opportunities for blockchain and cryptocurrencies Is there a legitimate future for the widespread use of cryptocurrencies? 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>Zabeen Moser-Mawji, Partner, Orbium Representative, Moxtra Representative, Millennium Banque Privée</p>   
13:00-14:00	Networking lunch
SESSION THREE: Investment Environment	
	Chair's opening remarks
14:00-14:20	<p>Investment products: Opening the Crypto – topic tbc</p> <ul style="list-style-type: none"> As 2019 approaches what are the investment themes that we can expect in the year ahead? How will the appetite for cryptocurrencies, alternative investments, equities and emerging markets play out and what have we learnt from 2018? Is there a path to a long-term, legitimate future for cryptocurrencies as an asset class?

	<ul style="list-style-type: none"> • If not crypto, then what purpose will DLT technology play in distribution? • All your eggs in one basket? How should wealth managers deal with demands for the whole portfolio view? <p>Mahesh Bulchandani, CEO, Asia Pacific Operations, FinIQ Consulting Pvt.Ltd</p> 
14:20-14:40	<p>Placing technology at the centre of your distribution strategy – topic tbc</p> <ul style="list-style-type: none"> • Exploring the role of technology in making cross-selling easier • Understanding what it takes to adapt in this continuously changing world • What are the preferred channels to service the new wealthy customer? • How to create a lasting relationship with a new type of customer? • Weighing the benefits of a customer-centric wealth model? • What room is there for a leaner distribution model with a Swiss finish? <p>Jacqui Cheshire, Partner, Head of Family Office, Switzerland, Stonehage Fleming</p> 
14:40-15:00	<p>Embracing new distribution channels to maintain market competitiveness</p> <ul style="list-style-type: none"> • Exploring new and effective use of distribution channels to drive profitability • Evaluating the impact of different distribution channels in attracting, retaining and managing an increasingly diverse customer universe. • Understanding what a successful hybrid approach to product distribution looks like • How are Swiss private banks adapting to the challenge of tight margins and higher costs? Is accelerated consolidation the only remedy? <p>Representative, Capital Banking Solutions</p>  
15:00 -15:20	<p>The impact of making an Impact – impact 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:</p> <p>Joseph Oumarou, Assistant Vice President, Banque Cantonale de Genève; Professor of Finance, ISFB - Institut Supérieur de Formation Bancaire (Genève) Mahesh Bulchandani, CEO, Asia Pacific Operations, FinIQ Consulting Pvt.Ltd. Representative, 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, Senior Business Advisor, Orbium</p> 
16:20-16:40	<p>Dealing with competition to the world’s largest wealth management hub –topic tbc</p> <ul style="list-style-type: none"> • What does the country need to do to stay ahead of the competition? • How can the industry leverage the country’s reputation for service excellence? • What should the new model private bank look like? • How can the industry balance wealth management commoditisation with Swiss flair?

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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
17:00-17:30	<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, Senior Business Advisor, Orbium Representative, Societe Generale Tobias Unger, Regional Manager Switzerland / Liechtenstein and Member of the Group Executive Board, Avaloq</p> 
17:30-17:40	<p>Chair's closing remarks</p>
19:00	<p>Drinks Reception and Awards Gala Dinner</p>