PRIVATE BANKING AND WEALTH MANAGEMENT GERMANY

TUESDAY 30th APRIL 2019 | FRANKFURT

Awarding leading Global Private Banks and Wealth Management Companies in Germany

2018 SPEAKING FACULTY

Ronan McCaughey, Editor, Private Banking International
Oliver Williams, Head and Co-Founder, WealthInsight
David Stubbs, Head of Client Investment Strategy for EMEA, JP Morgan
Christof Roßbrioich, Head of Sales Germany, Avaloq
Martin Weibeler, Vice President, Senior Product Manager, Primegate, Commerzbank AG
Guerson Meyer, Sales Director, Hearsay Systems
Mario Alves, Head of Sales and Partner Management, Aixigo
Riccardo Pianeti, Portfolio Engineer, Vice President, Citi Private Bank

2019 SPEAKING FACULTY

CHAIRMAN OF EVENT: Oliver Williams, Editor, Private Banker International
Thomas Rueschen, CEO, Deutsche Oppenheim Family Office AG
Marc Engelbrecht, Project Manager, Digital Innovation, Allianz Global
Gary Barnett, Chief Analyst, Technology Thematic Research, GlobalData
Michael Kohl, Managing Director, Commerzbank AG
Christian Mangartz, Head of Private Banking – West Region, HypoVereinsbank - Member of UniCredit
Reinhard Pfingsten, Chief Investment Officer (CIO), Bethmann Bank - ABN AMRO Group
Ralf Mielke, Head Sustainable Investments, Julius Bär Deutschland
Rainer Schuett, Assistant Vice President/ Senior Expert Private Banking, Deutsche Bank AG
Dr. Martin Deckert, Chief Operating Officer, Merck Finck & Co
Gerrit Heinz, Chief Strategist Germany, Deustche Bank Wealth Management
Juergen Rahmel, Chief Digital Officer, HSBC
Christof Roßbroich, Head of Sales Germany, Avaloq
Speaker TBC, Ortec Finance
Speaker TBC, SwissQuant

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PRIVATE BANKER INTERNATIONAL

CPD The CPD Certification Service

	Private Banking and Wealth Management Germany Conference and Awards 2019 Conference Day
08:00 – 09:00	**Registration and refreshments**
09:00 – 09:10	**CHAIR'S OPENING REMARKS:** **Oliver Williams, Editor, Private Banker International**
	SESSION ONE: What is the current state of Private Banking and Wealth Management in Germany?
09:10 – 09:30	***Questioning whether Private Banking in Germany has reached Leading European Wealth Centre status and steps to progress the hub*** - Describing the European view and spotlight of Germany in Private Banking. - Understanding the current pool of clients, competitors and using their knowledge to your benefit - Illustrating the current market trends and keeping competitive in one of the world's toughest industry. - Clarifying whether digitalisation has settled in Germany and Austria. If so what are the next steps and how should it be implemented? ***Gerrit Heinz,*** *Chief Strategist Germany,* ***Deustche Bank Wealth Management***
09:30 – 09:50	***The Old Versus the New – Established Wealth Hub of Innovative Wealth Centre?*** - What does the new competition look like? - How is the industry adapting to the new reality? - Remaining competitive in a challenging market avaloq essential for banking ***Christof Roßbroich,*** *Head of Sales Germany,* ***Avaloq***
09:50 – 10:10	***Clarifying the 2019 state of Private banking in Germany and Austria to strategically plan and manage risk for the future*** - Pinpointing the potential risks within the market and building strategies to overcome pitfalls - Understanding market trends and finding practical solutions to manage risk efficiently - Illustrating how far the industry has embraced technology to tap into new, sustainable markets - Discussing the benefits of transparency in digital platforms compared to human interactions to evaluate a better business strategy ***Michael Kohl,*** *Managing Director,* ***Commerzbank AG***
10:10 – 10:40	***MODERATED SPEAKER DISCUSSION AND Q&A SESSION*** *Moderated by* ***Oliver Williams,*** *Editor,* ***Private Banker International*** ***Michael Kohl,*** *Managing Director,* ***Commerzbank AG*** ***Gerrit Heinz,*** *Chief Strategist Germany,* ***Deustche Bank Wealth Management***
10:40 – 11:10	**Morning refreshments and networking**

	SESSION TWO: What forms of technology enhances client experience?
11:15 -11:35	***Applying Artificial Intelligence (AI) and machine learning for efficient client advice and accessible private banking platforms*** - Creating an automated processes using AI to help improve client experiences - Observing the benefits and pitfalls of AI within the industry, using the benefits to target key clients for advice and wealth management - Recognising the use of AI in Private Banking and understanding whether it would create transparency in the relationships between clients and Private Banks and Family Offices - Understanding how AI could provide insight and flexibility for clients regarding where they could put their wealth ***Marc Engelbrecht****, Project Manager, Digital Innovation,* ***Allianz Global Investors***
11:35 – 11:55	***The Digital Future of Wealth Management*** - Are FinTechs really disrupting? - Hybrid, Omnichannel banking as the future for advisor client interaction - Goal-based financial planning is the best translation of MiFID requirements *Speaker TBC****, ORTEC Finance*** ORTEC FINANCE
11:55 – 12:15	***Illustrating the need of both personal advice and robo-banking for excellent client experience*** - Understanding the need of robo-banking and how relationship managers adapt to deliver an effective client experience for their clients on the go - Calculating the benefit of robo-advice in a traditional society and understanding whether personal interaction has a place within digitalisation - Underlining what does the Next Generation of robo-advice look like in Germany - Illustrating whether personal advice is worth the time with complication ***Gary Barnett****, Chief Analyst, Technology Thematic Research,* ***GlobalData***
12:15 – 12:45	***MODERATED SPEAKER DISCUSSION AND Q&A SESSION*** *Moderated by* ***Oliver Williams****, Editor,* ***Private Banker International*** ***Marc Engelbrecht****, Project Manager, Digital Innovation,* ***Allianz Global Investors*** ***Gary Barnett****, Chief Analyst, Technology Thematic Research,* ***GlobalData***
12:45 – 13:45	***Lunch***

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	SESSION THREE: What are current regulations that disrupt and enhance Private Banking?
13:45 – 14:05	***PANEL DISCUSSION: Deconstructing ESGs (Environmental, Social, Governance) as proof to delivering superior results in Asset and Wealth Management*** - Understanding the risk of sustainable investments and whether it would be of asset value for clients interested in ethical results of investment - Clarifying the profitable areas of sustainable investment to understand areas - Integrating financial sustainability for ethical and long term investment with clients - Deconstructing the 17 European Union ESGs to better advise clients on different assets to better acquire different markets of wealth - Questioning Philanthropy: Is this a profitable form of investment? ***Reinhard Pfingsten,*** *Chief Investment Officer (CIO),* ***Bethmann Bank - ABN AMRO Group*** ***Ralf Mielke,*** *Head Sustainable Investments****, Julius Bär Deutschland***
14:05 – 14:25	***THIS SESSION IS RESERVED AND SPONSORED BY SWISSQUANT*** ***Speaker TBC, SwissQuant*** swissQuant Mastering Complexity
14:25 – 14:45	***Decoding the implemented Markets in Financial Investment Derivative II (MiFID II) and evaluating areas of support to help adapt to the challenging market for complete compliance*** - Discussing the changing role of MiFID and preparing steps for MiFID III for the demanding framework - Understanding the implemented derivative 1 year onwards and ensuring effective compliance - Understanding how MiFID II works alongside GDPR and outlining how GDPR disrupts data retention for MiFID II - Investing into processing automated areas of MiFID to speed the process to better protect clients SESSION RESERVED: ***Juergen Rahmel,*** *Chief Digital Officer,* ***HSBC***
14:45 – 15:15	***MODERATED SPEAKER DISCUSSION AND Q&A SESSION*** *Moderated by* ***Oliver Williams****, Editor,* ***Private Banker International*** ***Reinhard Pfingsten,*** *Chief Investment Officer (CIO),* ***Bethmann Bank - ABN AMRO Group*** ***Ralf Mielke,*** *Head Sustainable Investments****, Julius Bär Deutschland***
15:15 – 15:45	***Mid-Afternoon Refreshments***

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	SESSION FOUR: What is the Future of Private Banking?
15:45-16:05	***Clarifying the future digital needs of UHNWIs and HNWIs in Private Banks and Family Offices to successfully acquire the Next Generation in Private Banking*** - Illustrating how Private Banks and Family Offices adapt to the needs of the younger Generation - Revitalising the traditional role of banks to stay ahead of competitors - Understanding what digital strategies needs to be implemented to increase accessibility for clients - Pinpointing the different behaviours of cage groups in relation to private banking and assessing what immediate changes needs to be automated ***Thomas Rueschen**, CEO, **Deutsche Oppenheim Family Office AG***
16:05 – 16:25	***Keeping up with the changing behaviours and expectations of the Next Generation of Private Bankers: Strengthening your relationship to create a personalised service with the private clients of today*** - Generating new and innovative methods of meeting and acquiring clients born within the Millennial and Sandwich Generation - Creating a flexible client experience through digital means - Using phone, emails and social media such as WhatsApp to consistently connect with clients on the go - Staying ahead of the digital advances of the industry to successful integrate new clients ***Christian Mangartz**, Head of Private Banking – West Region, **HypoVereinsbank - Member of UniCredit***
16:25 – 16:55	***Closing Debate: Creating an effective hybrid model between digitalisation and relationship managers to effectively help millennials in banking*** - Optimising multi-channel services to build a hybrid model for effective and enhanced client service - Creating an efficient model of hybridisation which effectively has a good digital and online interface and offer real time solutions to clients - Effectively upgrading traditional offices to carry out automated processes and provide better 'basic' services (i.e. emails and phone) for enhanced contact with clients - Maximising face to face relationships between banks and clients to understand which particular areas could be driven by digital means effectively ***Rainer Schuett**, Assistant Vice President/ Senior Expert Private Banking, **Deutsche Bank AG*** ***Dr. Martin Deckert,** Chief Operating Officer, **Merck Finck & Co***
16:55 – 17:00	**CHAIR'S SUMMARY AND CLOSE OF CONFERENCE:** **Oliver Williams, Editor, Private Banker International**
17:00	**Close of Conference**
17:00 – 19:00	**Private Banker International Awards, Reception and Canapes**

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