

Private Banking & Wealth Management: London 2019 Conference and Awards

London, UK 13-Jun-2019





The 2019 summit will explore core themes impacting the UK private banking and wealth management sector. The daytime conference programme will seek to offer insight and clarity on the biggest challenges a post-Brexit trading landscape offers but will explore how technical innovations can offer solutions and improvements to enable companies to win greater market share.







2019 Speaking Faculty








Annabel Bosman, Managing Director, **Julius Baer**
Steven Cooper, Chief Executive Officer, **C.Hoare & Co**
Michael Nelson, Regional Managing Director, **BNY Mellon**
Anu Gurm, Head of Financial Planning & Advice, Private Banking Service, **Coutts & Co**
Sandy Macdonald, Head of Corporate Sustainability, **Standard Life**
Ian Dembinski, Head of Rathbone Private Office, **Rathbone Brothers**
Bijna Dasani, Head of Architecture, Delivery & Data, **Lloyds Banking Group**
Gareth Johnson, Head of Digital Channels and Investment Solutions, **Brewin Dolphin**
Wincie Wong, Head of Innovation, **RBS**
Oliver Williams, Editor, **Private Banker International**
Antonio Curia, Executive Director, **Wimmer Family Office & Wimmer Financial**
Oliver Moule, Business Developer, **Ortec Finance**
Ben MacGregor, Key Account Director, **GlobalData**
Ian Woodhouse, Head of Strategy and Change, **Orbium**
Mario Alves, Head of Sales and Partner Management, **Aixigo AG**
Alistair Shipp, Associate Partner, **Orbium**

Event Sponsors



Private Banking and Wealth Management 13 June 2019 Full Day Programme	
08:00 – 09:00	Registration and Welcome Refreshments
08:40 - 08:45	<i>Welcoming Remarks</i> Oliver Williams, Editor, Private Banker International 
SESSION ONE: Scanning the private banking and wealth management lanscape to foster continuity, growth and transparency	
08:45 – 09:05	Session Reserved for Kleinwort Hambros 
09:05 – 09:25	What are the Digital Trends in Wealth Management? <ul style="list-style-type: none"> • Reviewing the Global HNWI Demographics landscape to better assess their needs • Analysing how do clients wish to interact with their Wealth Manager to adapt training accordingly • Debating the level of importance countries place in Hybrid Advice to contextually adapt • Questioning whether 'BigTechs' are really disruptive Oliver Moule, Business Developer, Ortec Finance 
09:25– 09:45	Recapping on the changing role of the private banker to reflect client changes and the ever-evolving wealth management landscape <ul style="list-style-type: none"> • The changing role private bankers have in light of client changes driven by different backgrounds, societal changes and generational differences • Adapting to change by altering the hiring process to incorporate softer targets supported by apprenticeship and internship programmes • Recognising the increasingly rigorous requirement framework for new industry entrants Annabel Bosman, Managing Director, Julius Baer 
09:45– 10:05	Getting to Wealth Management 4.0 : Towards future success models of private banking and wealth management <ul style="list-style-type: none"> • The landscape is evolving with several challenges and not all industry participants are well positioned. • There are strong cost and revenue pressures, but opportunities exist to

	<p>better meet client needs, provide better support to advisors and improve operating model and systems efficiencies.</p> <ul style="list-style-type: none"> Many will underperform and not all players will survive, but some firms are successfully shifting towards higher performing business models <p>Alistair Shipp, Associate Partner, Orbium</p> 
10:05 – 10:35	Speaker Discussion and Q&A
<p><i>The above speakers will join an open and thought leading Q&A panel moderated by the conference chair. This will allow the audience to ask any questions in regards to the content delivered in the three preceding sessions. It will also allow the audience to share an insight and ideas on the content to contribute to even richer discussion.</i></p> <p>Wincie Wong, Head of Innovation, RBS Annabel Bosman, Managing Director, Julius Baer Oliver Moule, Business Developer, Ortec Finance Alistair Shipp, Associate Partner, Orbium</p>    	
10:35 – 11:05	Networking Break and Refreshments
<p>SESSION TWO: Tracing the shift in business models to best cater to the market in light of changing regulations, demand and trends</p>	
11:05 – 11: 25	<p>Identifying new regulation and client needs in a Private Banking context</p> <ul style="list-style-type: none"> Taking a stance on business conduct in light of new regulation to adapt accordingly Focusing on the customer experience and meeting client needs of tomorrow Considering the changing expectations from our stakeholders to ensure these are being met for business continuity <p>Martin Gregor Schuricht, Managing Director, Nykredit</p> 

11: 25 – 11:45	<p>Drawing lessons from family offices as successful leaders in gaining trust and establishing longstanding relationships between clients and providers</p> <ul style="list-style-type: none"> • Highlighting family offices success in building the appropriate service model • Seeing the changing needs of family offices as opportunities • Understanding the Family Office environment (1): the clash between transparency and confidentiality • Understanding the Family Office environment (2): insource or outsource? <p>Michael Nelson, Regional Managing Director, BNY Mellon</p> 
11:45 – 12:05	<p>Session Reserved for Excelian</p> 
12:05- 12:25	<p>Placing mass affluence within the wider context of increased segmentation of the private banking market to supplement decreased fees and foster business growth</p> <ul style="list-style-type: none"> • Assessing the possibility of mass affluence segmentation due to the rise of technological support and automated services • Debating the possibility of offering traditionally bespoke services to the masses to maintain the foundation of personalised services in private banking • Highlighting mass affluence as an opportunity to generate more clients to supplement fees due to the rise of robo-advice • Catering to a new client group by adapting to different attitudes and appetites to achieve client satisfaction <p>Gareth Johnson, Head of Digital Channels and Investment Solutions, Brewin Dolphin</p> 
12:25– 12:55	<p>Speaker Discussion and Q&A</p> <p><i>The above speakers will join an open and thought leading Q&A panel moderated by the conference chair. This will allow the audience to ask any questions in regards to the content delivered in the three preceding sessions. It will also allow the audience to share an insight and ideas on the content to contribute to even richer discussion.</i></p> <p>Antonio Curia, Executive Director, Wimmer Family Office & Wimmer Financial Gareth Johnson, Head of Digital Channels and Investment Solutions, Brewin Dolphin Michael Nelson, Regional Managing Director, BNY Mellon Martin Gregor Schuricht, Managing Director, Nykredit</p>    
12:55 – 13:55	<p>Networking Lunch</p>
<p>SESSION THREE: Making new technology an industry reality to better serve clients and offer operational efficiency</p>	

Chair: Ben MacGregor, Key Account Director, GlobalData



13:55 – 14:15

From Zurich to London: How a Private Bank boosted efficiency and satisfaction by adopting Digital Wealth Management

- The most important changes due to digitalisation
- What kind of technology was used - and with what background
- Challenges by the use of agile methods and their social effects
- Lessons learned for future projects
- The benefit of digitalisation for the bank
- Further future expansion steps

Mario Alves, Head of Sales and Partner Management, Aixigo AG



14:15 – 14:35

Leveraging the rise of robo-advice as a complementary service to face-to-face consultation to create a hybrid advice model

- Identifying robo-advice as a means of systemising back end processes to create opportunity to add greater value to traditional advisory mediums
- Striking the right balance between face-to-face and technology driven interaction to ensure client satisfaction
- Implementing tools to personalise the digital experience to make the client feel valued and taken care of
- Metrically analysing the cost benefits of robo-advice implementation in contract to remaining traditional in client engagement

Anu Gurm, Head of Financial Planning & Advice, Private Banking Service, Coutts & Co



14:35 – 14:55

Reviewing the competitive landscape in light of changes from new industry disruptors to assess its relevance on private banking

- Distinguishing the relevance of private banking moving forward in market full of disruptors in technology
- Highlighting the advancement lag between private banking and retail banking to initiate change
- Identifying the current technology landscape's inability to cater to complex needs needed in the private banking market
- Approaching the market differently by offering 'out-of-the-box' services addressing client needs

Steven Cooper, Chief Executive Officer, C.Hoare & Co



14:55 – 15:25

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C. Hoare & Co.
PRIVATE BANKERS SINCE 1871

Coutts | 
aixigo

15:25– 15:55 Networking Break and Refreshments

SESSION FOUR: Going above and beyond in Next Generation Planning to support well equipped millennials in an increasingly socially responsible world

Chair: Ian Woodhouse, Head of Strategy and Change, **Orbium**

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15:55– 16:15 **Interactive On-Stage Interview: Exploring how the wealth management industry appeal to the next generation of clients**

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- The importance of financial education to empower the client's investment decisions

Marketing for diversity, is it all just political correctness or good commerce?

- Considering the role of ethical investment within a client's portfolio
- Is robo advisory the likely winner for the next generation of clients?
- How do the established wealth managers stay relevant and stay in business?

Ian Dembinski, Head of Rathbone Private Office, **Rathbone Brothers**

Rathbones
Look forward

16:15– 16:35 **Detangling the philanthropy, ESG and sustainable investing landscapes as a growing area within the next generation planning**

- Offering bespoke philanthropy solutions as a means of expanding product offering and differentiating oneself in a crowded marketplace
- Working alongside clients in light of their increased involvement in philanthropic investments to build a stronger relationship
- Identifying philanthropic ventures as a means of adding value and making a positive contribution
- Placing philanthropy against a wider portfolio objective to ensure it is contributing to a client's needs and goals

Bijna Dasani, Head of Architecture, Delivery & Data, **Lloyds Banking Group**


LLOYDS BANK

16:35– 16:55 Speaker Discussion and Q&A

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 Ian Dembinski, Head of Rathbone Private Office, **Rathbone Brothers**
 Sandy Macdonald, Head of Corporate Sustainability, **Standard Life**



16:55 – 17:25	Expert Panel: Integrating technology and models to offer a streamlined and transferable experience to improve client experience <ul style="list-style-type: none"> • Reviewing the compatibility of various new technologies with existing infrastructure to ensure safe transfer of data to minimise data entry points • Considering the regulators role in new technologies as a self-help tool to assess the thin line between guidance and advise • Offering a fully digitalised client experience through integration of front not just front end technologies but also back end technologies • Integrating technologies to offer clients a holistic view of their wealth to help them inform decisions
17:25– 17:30	<i>Closing Remarks</i>
19:00 – 22:30	Private Banker International Gala Dinner and Awards