

## 11 December 2019, Zurich

08.00      **Registration**

09.00      **Welcome address and chair's opening remarks**  
Oliver Williams, Editor, *Private Banker International*

### SESSION ONE | Navigating the evolving private banking landscape

09.10      **Keynote address | Why the generational shift in the client and the staff population is an opportunity for Wealth Managers**

- The generational transition of wealth will reach record highs in the coming 10 years, what are the implications for Wealth Managers?
- A new generation of staff entering a rapidly changing work environment – a SWOT analysis.
- Key success factors for turning the challenges ahead into opportunities for the future

**Tobias Wagner**, Chief Executive Officer Zurich, *Societe Generale*

09.30      **The Next-Generation Wealth Manager**  
**Pierre Bouquieaux**, Product Director, Wealth, *Temenos*

09.50      **Keynote address | Title to be confirmed**  
Senior representative, *BNP Paribas*

10.10      **Title to be confirmed**  
Senior representative, *Prometeia*

10.30      **Leaders' forum and Q&A | A strategic overview: the future of private banking and wealth management**

- A spotlight on the strategic trends in Switzerland: consolidation, partnerships, and more
- The best of both worlds: optimising private banking services in a digitalised age
- Attracting new talent and investing in the skills to drive competitive advantage
- Innovation... more than just a buzzword: getting cultural buy-in from all stakeholders to efficiently create new products, services and models
- Upcoming political uncertainty and instability: how can banks best prepare?

**Tobias Wagner**, Chief Executive Officer Zurich, *Societe Generale*  
**Nicolas Bonvin**, Head of Applied Innovation, *Banque Pictet & Cie*  
Senior representative, *BNP Paribas*  
**Pierre Bouquieaux**, Product Director, Wealth, *Temenos*  
Senior representative, *Prometeia*

11.15      **Refreshment break**

## SESSION TWO

Stream A | Digital, convenient, personal:  
customer-centric digital strategies

11.45 **Title to be confirmed**  
*Senior representative, Moxtra*

12.05 **Title to be confirmed**  
*Senior representative, BBVA*

12.25 **Title to be confirmed**  
*Senior representative, Orbium*

12.45 **Panel discussion | Making the leap to digital: getting it right**

- Looking into the exciting benefits of agile systems: what are the value-added gains for banks and customers?
- From UHNW to mass affluent

Stream B | Let's talk about investments:  
2020 and beyond

11.45 **Investing 4.0: how to master complexity in meeting your technological requirements during this digital era**

- Exploring the 'building blocks' theory in portfolio management and the technological abilities to make this a reality
- Digging into the 3-layer approach to technological change
- Secure, smart, agile: exploring the requirements of each level in the context of technological transformation

**Mario Alves**, *Head of Sales and Partnerships, Axigo*

12.05 **Innovation focus | Vontobel**  
**Thinking outside the box: capitalising on technological advancements in investments**

- Getting from A to B: the journey to AI-powered analytics and robo advice
- Utilising the power of an established brand: successfully innovating and launching new propositions
- What's next?

*Reserved for Vontobel*

12.25 **Making blockchain investments a reality**  
*Senior representative, Invao Trading*

12.45 **Discussion and Q&A | Exploring the investment landscape of today and tomorrow**

- Improving returns for clients: how and where should client assets be invested?

customers: assessing your unique customer base and their digital needs

- Communicating with offshore clients: exploring the power of digital to enhance customer experiences and secure client-bank communications
- Boutique versus incumbent players: to what extent does cost take priority when making decisions?
- Keeping private banking values at the heart of digital transformation: making relationships the star of the show
- Focusing on the risks that come with digital advancements: a double-edged sword for security?

Senior representative, **Moxtra**

Senior representative, **Finnova**

Senior representative, **BBVA**

Speaker to be confirmed

- Emerging markets, alternatives and beyond: diversifying portfolios and increasing returns
- The B word: how can private banks and wealth managers best prepare for the impacts of Brexit on markets?
- Blockchain and cryptocurrencies: exploring the opportunities and challenges for investors
- Embracing new technologies to enhance future investments: strategies for success

**Théodore Economou**, Chief

Investment Officer, **Lombard Odier**

**Nicolas Bickel**, Head of Exclusive

Advisory, **Edmond De Rothschild**

Senior representative, **Invaio**

**Trading**

Senior representative, **Lombard**

**International**

**Martin Burgherr**, Chief Client

Officer, **Sygnum**

13.30 **Lunch**

### SESSION THREE

#### Stream A | A technological overhaul of traditional business models

14.30 **Title to be confirmed**  
Senior representative, **Wealth Dynamix**

#### Stream B | Successfully serving the evolving client base: meeting and exceeding expectations

14.30 **Fees down, costs up? How to create value for sustained profitability**  
*Exploring what today's investors expect according to Appway's freshly released 2019 Wealth Management study, conducted by Scorpio Partnership*

- 'Be more like Amazon': Investors' vision of tech-inspired value creation
- Touch me if you can: Using the right dosage of online and offline interactions
- 35 years and nouveau riche: What I want from my private banker
- How Appway helps wealth managers respond to these challenges.

Senior representative, **Appway**

14.50 **Designing streamlined and cost-efficient processes: utilising automation to combat squeezed margins**

- From advice to portfolio consolidation: what processes can be automated?
- Increased productivity: exploring the long-term cost savings that automation can grant banks
- Automating the trivial to focus on what's important: the client
- The reality of implementing automation in the workplace: what steps must be taken to ensure smooth adoption of new tech and processes?

*Speaker to be confirmed – bank*

15.10 **Title to be confirmed**  
*Senior representative, Unblu*

15.30 **Panel discussion | Bringing together technology, business strategy and skillsets: the road to fruitful innovation**

- Exploring the reality of squeezed profit margins: how is this impacting banks in Switzerland?
- Innovative leaders today: which companies have successfully created and implemented cost-efficient strategies?
- How might partnerships bring in new technological capabilities and innovative mind-sets to help evolve

14.50 **Title to be confirmed**  
*Senior representative, Millennium Banque Privée*

15.10 **A sea of opportunity: capitalising on the exciting potential of Open Banking**

- Seeing beyond payment related use cases: digging into the strategic advantages of Open Banking
- What are the applications of Open Banking and open APIs for private banks and wealth managers?
- Connected digital platforms: strengthening relationships and offering new services
- Creating competitive advantages: keeping relationships at the heart of digital developments to attract and retain clients

*Simon Alioth, Associate Partner, Synpulse*

15.30 **Debate | Keeping next-gen clients on-side in an increasingly competitive landscape**

- How are the demands of next-gen clients different to today's mass client base?
- Digital natives versus digital immigrants: understanding the communication preferences that vary between different demographics
- Discussing the importance of communicating with clients earlier on in their lives: building

legacy business models?

- Preparing the workforce to remain competitive: what must be done to achieve this in the digital era?
- Adding more value to customers: what value-add services can be developed and how can these be monetised?
- Fail and fail fast: encouraging cost-efficient experimentation within the business

Senior representative, **Wealth Dynamix**

Senior representative, **Unblu**

strong relationships from an early age

- What must be done to retain next-gen clients as digital competition grows?
- 'Good enough' isn't good enough anymore: to what extent will banks' digital services have to compete with the likes of Spotify and Amazon?

Senior representative, **Millennium Banque Privée**

Senior representative, **Appway**

Speaker to be confirmed

## 16.00 Refreshment break

### SESSION FOUR | Disruptive forces transforming the industry

#### 16.30 Regulatory update in Switzerland: CDB 20

- Uncovering the key amendments to CDB 20 and impacts on the banking industry
- How will these changes specifically impact KYC processes?
- From compliance controls to changes in identification: how can banks best prepare?
- How might employees need to be trained?

**Joseph Oumarou**, Assistant Vice President, **Banque Cantonale de Genève**, Professor of Finance

#### 16.50 Title to be confirmed: Impact becomes mainstream

Senior representative, **FTSE International**

#### 17.10 Interview | Rise of the WealthTechs: friend or foe?

*WealthTechs and FinTechs have steadily entered the market, with new business models, lower charging structures and unique offerings that have been targeted at certain market segments. But how big of a threat are these agile players to private banks and wealth managers? How might partnerships be made to facilitate growth and innovation on both sides? What are the new players focusing on, and why? Get the answers to these questions and more during this exclusive interview.*

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

**Interviewee: Ludwig Ressler**, Managing Director, Senior Advisor, **Julius Baer**, Board Member, **F10 FinTech Incubator and Accelerator**

#### 17.30 CEO's panel discussion | Staying one step ahead of the curve

- An inter-connected and secure industry: finding the balance between remaining compliant and creating seamless customer experiences
- Working towards a greener earth: what more can the industry do to drive positive change for the environment?
- Google, Amazon, Facebook, Apple: how can the industry compete with the tech-titans

should they enter the word of private banking and wealth management?

- Blockchain disruption: will blockchain ever replace core banking?

**Tobias Wagner**, Chief Executive Officer Zurich, **Societe Generale**

Senior representative, **Temenos**

Senior representative, **FTSE International**

Senior representative, **BNP Paribas**

18.00      **Chair's closing remarks and end of conference**

19.00      **Drinks reception followed by the awards ceremony**