

## Private Banking & Wealth Management: London 2020 Conference and Awards

London 11-Jun-2020

### Confirmed Presenters & Chairs

**Patrick Brusnahan**, Editor, **Private Banker International**  
**David Durlacher**, Chief Executive Officer, **Julius Baer International**  
**Duncan MacIntyre**, Chief Executive Officer UK, **Lombard Odier**  
**Stéphane Monier**, Group Managing Director & Chief Investment Officer, **Lombard Odier**  
**Salman Haider**, Managing Director, Head of Global Growth Markets, **Barclays Private Bank**  
**Gregory Perdon**, Co-Chief Investment Officer, **Arbuthnot Latham & Co.**  
**Sharon Maguire**, Chief Customer Officer, **C.Hoare & Co.**  
**Samuel Brown**, Strategy Director – Strategy, Sustainability & Innovation, **Coutts & Co.**  
**Patrick Thomas**, Investment Director, **Canaccord Genuity Wealth Management**  
**Antonio Curia**, Executive Director & Head of Economic Research Unit, **Wimmer Financial LLP**  
**Guy Healey**, Head of Private Banking, **Brown Shipley**  
**James Longstaff**, Head of Innovation & Delivery, **Shawbrook Bank**  
**Damian Payiatakis**, Head of Impact Investing, **Barclays Private Bank**  
**Charles Radclyffe**, Former Head of AI, **Fidelity International**  
**Ravi Sidhoo**, Managing Director – Private & Business Banking, **Cynergy Bank**

**Private Banking and Wealth Management**

**11 June 2020**

**Full Day Programme**

08:00 – 09:30 Registration and Welcome Refreshments

08:30 - Welcoming Remarks

08:40 Patrick Brusnahan, Editor, Private Banker International



**SESSION ONE: Global Market Challenges & Opportunities**

08:40 – 09:05 **QE Infinity: Are We Walking into Another Financial Crisis?**

- A brief step through time to determine historical context
- Analysing triggers and causes of concern which may cause doubts on the future of QE
- Sharing forecasts for the year ahead and predicting problems the ECB may encounter

**Gregory Perdon, Co-Chief Investment Officer, Arbuthnot Latham & Co.**

09:05 – 09:25 *Reserved for UBS – Geopolitical Outlook*

09:25– 09:45 **Global Markets & Opportunities In A Post-Brexit World**

- Detailing how Barclays Private Bank view the global markets and the opportunities available
- Analysing the role of Barclays on the world stage as a truly international private bank
- Idealizing a Post-Brexit world and how London will be seen on the world stage

**Salman Haider, Managing Director, Head of Global Growth Markets, Barclays Private Bank**

09:45– 10:05 *Reserved for Event Partner*

10:05 – 10:25 Speaker Discussion and Q&A

*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.*

**Gregory Perdon, Co-Chief Investment Officer, Arbuthnot Latham & Co.**

**Salman Haider, Managing Director, Head of Global Growth Markets, Barclays Private Bank**

*Reserved for UBS*

10:25 – 10:55	Networking Break and Refreshments	
SESSION TWO		
	Stream A - Digital	Stream B - Sustainability
10:55 – 11:15	Reserved for Appway	Reserved for Event Partner
11: 15 – 11:35	<b>Utilising AI to Drive Engagement Through Hyper-Personalisation</b> <ul style="list-style-type: none"><li>Identifying the balance between human interaction and technology to streamline the customer journey</li><li>Presenting key challenges faced when introducing AI technology into a traditional private bank</li><li>Showcasing success stories of the first steps within the Ai journey within C. Hoare &amp; Co</li></ul> <b>Sharon Maguire, Chief Customer Officer, C.Hoare &amp; Co</b>	<b>Sustainable Inside &amp; Out: Aligning Corporate, Client and Product Sustainability</b> <ul style="list-style-type: none"><li>Over 220 years of thinking and acting sustainably</li><li>Becoming a B Corp – using business as a force for good</li><li>Sustainability – an ongoing journey involving all stakeholders</li></ul> <b>Duncan MacIntyre, Chief Executive Officer UK, Lombard Odier</b>
11:35 – 11:55	Reserved for Nykredit	Reserved for Event Partner
11:55 – 12:15	<b>Harmonizing The Introduction Of Robo-Advice Technology</b> <ul style="list-style-type: none"><li>Understanding what is meant by the Hybrid Model and how this can introduced successfully</li><li>Highlighting the cost challenges associated when introducing technology to ensure realizable ROI</li><li>Overcoming integration challenges faced to ensure successful launch of robo-advice services</li></ul> <b>Guy Healey, Head of Private Banking, Brown Shipley</b>	<b>The Global Approach To Sustainability</b> <ul style="list-style-type: none"><li>Presenting Lombard Odier's approach to sustainable investing to determine how 'sustainable' is defined</li><li>Balancing long term financial growth along with sustainability to create a win-win situation for all</li><li>Highlighting key international markets for growth within the sustainability criteria</li></ul> <b>Stéphane Monier, Group Managing Director &amp; Chief Investment Officer, Lombard Odier</b>
12:15 – 12: 35	Reserved for Ortec	Reserved for Event Partner
12:35 – 12:55	<b>Shedding the light on AI Adoption to Determine Increasing Relevance</b>	<b>Changing Regulatory Expectations on Sustainability</b>

	<ul style="list-style-type: none"><li>Introducing how private banks &amp; wealth managers are adopting AI to meet the changing needs of clients</li><li>Discussing ROI for AI investments to determine value to organisations</li><li>Switching from a legacy model to a AI driven model to assess the changing role of technology</li></ul> <p><b>Ravi Sidhoo, Managing Director – Private &amp; Business Banking, Cynergy Bank</b></p>	<ul style="list-style-type: none"><li>Reviewing current industry approaches for sustainability &amp; ESG investments</li><li>Highlighting potential changes driven by regulators, e.g. ESMA Sustainable Finance consultation, FCA Sandbox on investor motivations and preferences</li><li>Striving for change and improvements, a spotlight on Barclay's developments &amp; experience</li></ul> <p><b>Damian Payiatakis, Head of Impact Investing, Barclays Private Bank</b></p>
12:55 – 13:15	Speaker Discussion and Q&A	Speaker Discussion and Q&A
	<p><i>The above speakers will join an open and thought leading Q&amp;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><b>Ravi Sidhoo, Managing Director – Private &amp; Business Banking, Cynergy Bank</b> <b>Sharon Maguire, Chief Customer Officer, C.Hoare &amp; Co</b> <b>Guy Healey, Head of Private Banking, Brown Shipley</b> <i>Reserved for NyKredit</i> <i>Reserved for Ortec</i></p>	<p><i>The above speakers will join an open and thought leading Q&amp;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><b>Damian Payiatakis, Head of Impact Investing, Barclays Private Bank</b> <b>Duncan MacIntyre, Chief Executive Officer UK, Lombard Odier</b> <b>Stéphane Monier, Group Managing Director &amp; Chief Investment Officer, Lombard Odier</b></p>
13:15 – 14:15	Networking Lunch	
SESSION THREE		
	Stream A – Digital	Stream B – Impact & Sustainability
14:15 – 14:35	<p><b>AI or APIs - how best to balance technology investment</b></p> <ul style="list-style-type: none"><li>Highlighting the opportunities provided by AI and API technologies</li><li>Why Open Banking is the greatest opportunity (and threat) to incumbents – case study from Insurance sector</li></ul>	<p><b>Defining the Demands of Millennials Investors</b></p> <ul style="list-style-type: none"><li>Appreciating the transfer of wealth to Millennial investors to be best placed to win this business</li><li>Showcasing the key criteria for investment demanded from Millennial investors</li></ul>

	<ul style="list-style-type: none"><li>Where AI, Blockchain, Chatbots, and RPA meet – and where APIs fit in</li></ul> <p><b>Charles Radclyffe, Former Head of AI, Fidelity International</b></p>	<ul style="list-style-type: none"><li>Driving loyalty through the use of technology, how can this be adopted to reduce client loss</li></ul> <p><b>David Durlacher, Chief Executive Officer, Julius Baer International</b></p>
14:35 – 14:55	<i>Reserved for Event Partner</i>	<i>Reserved for Event Partner</i>
14:55 – 15:15	<p><b>Adopting Wider Innovation Trends Into Private Banks &amp; Wealth Management</b></p> <ul style="list-style-type: none"><li>Highlighting innovation themes from across the consumer space to identify how these can be adopted by Private Banks</li><li>Presenting the shift of technology spend drivers from enterprise to consumer demand</li><li>Exploring examples of financial services firms who have successfully embraced consumer driven markets</li><li>Discussing lessons that can be learned from retail banking and Fintech</li></ul> <p><b>James Longstaff, Head of Innovation &amp; Delivery, Shawbrook Bank</b></p>	<p><b>How Sustainable is Sustainable?</b></p> <ul style="list-style-type: none"><li>Presenting growth across the ethical investment sector to determine popular choices for new wave of investors</li><li>Balancing impactful investment choices made by millennials to determine development of new product offerings</li><li>Arguing the future of sustainable to make the move to mainstream as more organisations meet the criteria</li></ul> <p><b>Patrick Thomas, Investment Director, Canaccord Genuity Wealth Management</b></p>
15:15 – 15:35	Speaker Discussion and Q&A	
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15:35 – 16:05	Networking Break and Refreshments	
SESSION FOUR: The Future Of Private Banking & Wealth Management		
16:05 – 16:25	<p><b>Achieving Growth Through Targeting The Mass Affluent Category</b></p> <ul style="list-style-type: none"><li>Appreciating the rising cost of regulation to drive private banks &amp; wealth managers to target new markets</li><li>Considering key marketing decisions to target the Mass Affluent category</li></ul>	

	<ul style="list-style-type: none"> <li>Comparing the cost of acquisition for Mass Affluent to maintain profitability</li> </ul> <p><b>Samuel Brown, Strategy Director – Strategy, Sustainability &amp; Innovation, Coutts &amp; Co</b></p>
16:25 – 16:45	<i>Reserved for Event Partner</i>
16:45 – 17:25	<p><b>Closing Panel: Future Trends &amp; Challenges To Effect Private Banks</b></p> <p><i>The above speakers will join an open and thought leading Q&amp;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><b>Antonio Curia, Executive Director &amp; Head of Economic Research Unit, Wimmer Financial LLP</b>  <b>Samuel Brown, Strategy Director – Strategy, Sustainability &amp; Innovation, Coutts &amp; Co</b></p>
17:25 – 17:35	<i>Closing Remarks</i>
19:00 – 22:30	Private Banker International Gala Dinner and Awards