SWISS-ASIA Wealth Exchange 2014

hubbis

Thursday 30th October
Crowne Plaza Zurich

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Who is Hubbis?

Launched in March 2010, Hubbis is the leading provider of content and online learning for Asia's Wealth Management & Private Banking Industry.

We produce independent, timely, practical, relevant and Asia-specific content – via editorial, video Q&As and presentations, research and thought-leadership, events such as forums and high-impact briefings, online learning, and other tools & resources – to drive professional development in Asian wealth management.

The content covers:

- Regulation & Compliance
- Investments
- Family Wealth
- Skills
- Strategy & Business

We create connectivity across – Private Banking, Independent Wealth Management, Retail Banking, Asset Management, Insurance, Technology, Professional Services and other communities.

For more information, please contact:

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Welcome

The **SWISS-ASIA Wealth Exchange 2014** is designed to uncover the reality of the Asian opportunity – both via investment strategies and trends, as well doing business profitably and sustainably in what is arguably the most exciting region globally.

You must attend if you want a focused opportunity to network and meet like-minded people from single family offices, multi-family offices, independent / external asset management companies, boutique private banks and other relevant institutions – looking to build on and enhance the connectivity between Asia and Europe.

Many speakers are also flying in from Hong Kong and Singapore to share their insights and experiences on what it takes to be successful in Asia.

The agenda includes a series of panel discussions and targeted presentations – to cover a wide spectrum of asset classes such as: direct investment, property, real assets, private equity and other alternatives. It also includes topics relating to wealth structuring, tax optimisation, business formation and setting up operations in Asia – to understand how to do business in Asia today given the investment, regulatory and compliance dynamics and requirements.

This will help you answer questions such as:

- » Should you be accessing Asia from Europe? Or setting up operations on-the-ground?
- » How do you set up your business in different Asian markets?
- » Should you be allying with an independent wealth manager, or an established private bank – and why?
- » Are plug-and-play solutions appropriate or desirable?
- » Is it better to combine resources with other firms like yours?
- » Where can you find real connectivity for you and your clients?

Senior management at leading independent wealth managers, family offices and other relevant organisations from both regions will share their views on how to make the most of this potential as well as avoid the pitfalls, in relation to investing, setting up operations and accessing local clients.

This is for a select group of 120 individuals to attend and participate – comprising roughly 30 from Asia and 90 from Switzerland and elsewhere in Europe – including anyone working within a private bank, a single or multi-family office, independent / external asset manager, or any other organisation which is licensed to offer investment advice to wealthy clients.

We look forward to seeing you at the event.

Michael Stanhope
Chief Executive Officer
Hubbis

Agenda

8.40am **REGISTRATION**

9.00am **Welcome address**

David Schmid
Head of Asia Structured Solutions
Leonteq Securities (Singapore) Pte Ltd

9.10am **Panel discussion**
The Swiss-Asia Link - creating more connectivity

- How are the dramatic changes in the Swiss wealth management landscape influencing how the market is likely to look at Asia for more connectivity going forward?
- How is the value proposition of Swiss private banking changing in the eyes of Asian clients?
- How is the perception of Switzerland changing in terms of the leading global wealth management hub, and what does this mean for the continued flow of assets to Asia?
- Where do clients now want to base their business?
- Where are the opportunities for greater synergies between Europe and Singapore / Hong Kong?
- What do HNW and UHNW clients want to invest in? Properties, listed investments, private equity, etc?
- How can you make the most of the interest from Asian clients in Europe, and vice versa?
- How can professional advisers work more closely with clients going forward to resolve these issues?

Chair

Andrew Crooke
Editor
Hubbis

Agenda

Panel members

Herwig Van Hove
Managing Partner
Notz Stucki Group

Terry Alan Farris
Chief Development Officer, Development Office
Nanyang Technological University

Vikas Gattani
Founder & Chief Executive Officer
Progress Capital

Bruno Patusi
Partner, Wealth & Asset Management Leader
Ernst & Young

Dana Ritter
Co-Founder, Managing Director
Dragon Wealth

9.50am **Presentation**
What is the Asian century and how should you approach it?

David Bellingham
Former Chief Executive Officer
Professional Investment Advisory Services

- What does Asia's macro landscape look like?
- How can you take advantage of Asia's growth story?
- What investment and business opportunities does this present?

10.05am **Keynote presentation**
Case study: the Leonteq growth story in Asia

David Schmid
Head of Asia Structured Solutions
Leonteq Securities (Singapore) Pte Ltd

- What it takes to create a successful Asian business
- Step-by-step planning
- Adapting and evolving mind-sets to drive growth
- Forging win-win partnerships
- Capitalising on the Asian growth potential

10.25am **Presentation**
India - is it for real this time or again hyped-up expectations?

Vikas Gattani
Founder & Chief Executive Officer
Progress Capital

- What does the change in regime (new government) mean for investors?
- What's the likely economic impact?
- Market views on India
- What's the best way to play the Indian market

10.40am **REFRESHMENTS & NETWORKING**

11.10am **Panel discussion**
Forget about yield - how can you deliver performance

- Warehousing assets for various reasons is no longer the priority. What are end-investors now looking for?
- What are the component elements of delivering performance?
- What are the opportunities to find the best performance in your portfolio?
- Which asset classes, geographies, sectors and themes offer the best chances of performance - and why?
- What research capabilities are required to perform for your clients?
- Does global coverage matter? Why?
- How can you deliver global coverage for your clients?
- What steps and processes do you need to take to look beyond Switzerland and Europe?
- What are the prudent ways to access global markets?
- How important is it to use platforms that provide flexibility and more sophisticated investment strategies?

Chair

Andrew Crooke
Editor
Hubbis

Panel members

David Schmid
Head of Asia Structured Solutions
Leonteq Securities (Singapore) Pte Ltd

Lei Zhu
Senior Portfolio Manager, Asian Fixed Income
Credit Suisse

Lodewijk Lamaison
Managing Partner
CAIDAO Wealth

Mark Browne
Director, and Head of Business Development, Switzerland
Secure Wealth Management

Agenda

11.55am **Presentation**
The Chinese real estate market - a major risk or opportunity?

Lei Zhu
Senior Portfolio Manager, Asian Fixed Income
Credit Suisse

- What are the trends in Chinese real estate?
- Where are the biggest opportunities?
- How can you access this asset class?
- What are the pitfalls to watch out for?

12.10pm **Panel discussion**
Accessing Asia - where can you find the best value today?

- What are the main drivers for investing in Asia?
- How can you tell whether a particular investment makes sense for you and your clients?
- What is the "right" level of exposure to Asia?
- What is a sensible time horizon for investing in Asia?
- How can you access the Asian consumption story?
- What types of products and vehicles offer the smartest way to do so?
- Where are the most exciting direct investment opportunities'? What are the considerations for investing?
- Where should China and India fit into an exposure to Asia?
- How important is the ability to liquidate quickly? Should it be important when investing in Asia?
- What risks should you be aware of?

Chair

Andrew Crooke
Editor
Hubbis

Panel members

Harmen Overdijk
Managing Partner
CAIDAO Wealth

Norman Villamin
Chief Investment Officer, Europe
Coutts

Xavier Burkhardt
Investor Relations Manager
EuroFin Asia Group

Seamus Donoghue
Chief Executive Officer
Allocated Bullion Solutions

David Bellingham
Former Chief Executive Officer
Professional Investment Advisory Services

1.00pm **LUNCH**

1.45pm **Panel discussion**
Doing business profitably in Asia

- What are the realities of doing business in Asia today?
- In what ways do the investment, regulatory and compliance dynamics and requirements influence what you can do and how you can do it?
- Which markets offer the most potential - and why?
- What are the key drivers of developing a successful Asian business?
- How should you define your value propositions to make the most of the potential?
- Should you go it alone? Or form a joint venture?
- What should be considered an acceptable return on investment?
- What are the main challenges relating to the compliance burden? And how can these be overcome?

Chair

Andrew Crooke
Editor
Hubbis

Panel members

Alex Borissov
Founding Partner
Finaport

Andrew Hendry
Managing Director, Asia
M&G Investments

Mandeep Nalwa
Founder, Chief Executive Officer
Taurus Wealth

Ray Soudah
Founder & Managing Partner
MilleniumAssociates

Urs Tanner
Managing Partner
APASWISS

Agenda

2.25pm **Presentation**
Dealing with the reality of global transparency

Eric Boes
International Tax
Amicorp Group

- Developments towards global system of Automatic Exchange of Information
- FATCA and Intergovernmental Agreements with Asian countries
- How will the G20 system affect China, Korea and Indonesia and other Asian nations?
- How do all these developments impact HNWIs and structuring solutions?

2.40pm **Presentation**
Family offices in Asia - a solution in development

Nigel Rivers
Global Head of Private Clients
TMF Group

- What are the trends in family offices in Asia?
- How do Asian clients view and use family offices?
- How can the family office concept make more in-roads?
- What are the misconceptions and pitfalls of family offices among Asian clients?
- What infrastructure, governance and risk frameworks are required?

2.55pm **Presentation**
Finding suitable structures for Asian wealth in Europe

Simon Denton
Managing Director, UK
Sovereign Group

This presentation will look at Private Trust Companies (PTCs) and their application to private Asian clients for wealth planning, protection, succession and the de-controlling of active and profitable companies. This will cover:

- A review of onshore and onshore jurisdictions that are used for the deployment of PTCs
- A brief analysis in how PTC should be structured for optimum tax and related planning
- Case study illustrations in how successful business owners and wealthy families can take advantage of PTCs and how underlying international trading and related companies can be owned by such arrangements

3.10pm **REFRESHMENTS & NETWORKING**

3.35pm **Presentation**
Investment and wealth preservation structures

James Martin
Group Marketing Director
Trident Trust

This will look at practical case study examples of the appropriate use of corporate and fiduciary structures to achieve goals such as:

- Wealth preservation
- Tax efficiency
- Succession planning

3.50pm	**Panel discussion**
	Wealth and tax optimisation in a global and transparent world

- With the rapid migration of global wealth - what are the considerations with wealth and tax planning?
- What are the current issues HNW and UHNW individuals & families should consider with regard to legacy, estate & succession planning, and tax planning?
- What impact does this have on how families should think about governance?
- What does global transparency mean for the types of structures and solutions that are most suitable today for international assets?
- How should you tackle the offshore challenge?
- Where do people now want to live? What are the issues relating to citizenship, and what passports do they want?
- Which residency programmes are most interesting at the moment?
- Seeking retirement opportunities - considerations and requirements
- When and how is it appropriate to engage product and service providers?

Chair

Andrew Crooke
Editor
Hubbis

Panel members

Peter Golovsky
Managing Director, Global Head of Private Clients
Amicorp Group

Simon Denton
Managing Director, UK
Sovereign Group

James Martin
Group Marketing Director
Trident Trust

Nigel Rivers
Global Head of Private Clients
TMF Group

4.30pm	**Forum ends**

Events

Hubbis has organised 80+ successful conferences, seminars, and dozens of thought-leadership discussions for over 7,500 delegates.

Online Learning

Hubbis' online learning management system contains over 80 courses and over 300 hours of opportunities to earn CPD/CPT hours.

Publications

Hubbis produces a variety of independent, timely, practical, relevant and Asia-specific content in video and written format.

HELPING ASIA LEAD THE WORLD IN WEALTH MANAGEMENT

Hubbis was founded in March 2010 in response to a clear need within Asian wealth management for higher standards and better-trained advisers.

Our community, training and continuing education activities leverage a deep pool of highly-supportive industry specialists and subject matter experts. This enables us to deliver highly-regarded, targeted, timely and independent **events, publications** and **online learning.**

Through our various resources we enable practitioners to be professional and capable in their dealings with clients. Hubbis activities have the power to drive the future of professional development in Asian wealth management.

For more information contact: **info@hubbis.com**