

Agenda

8.40am Registration

9.00am Welcome address

Andrew Crooke
Editor
Hubbis

9.05am Panel discussion Taking Indonesian wealth management to the next level - and region-wide

- What are the key drivers for growing wealth management in Indonesia?
- Where are the biggest opportunities - and challenges?
- What is the potential for Indonesia to develop as a regional wealth management hub?
- As Indonesia's significance in wealth management continues to increase - how should the regulators help facilitate the industry's further development into a centre of excellence?
- How can Indonesian banks grow their footprint in Asia? Are there any success stories to date?
- What investments in their platform and technology are institutions making to support and achieve their growth objectives?
- How can Indonesian firms best service clients as they look to invest in overseas markets?
- What might hold the local market back?

Chair

Andrew Crooke
Editor
Hubbis

Panel members

Ivan Jaya
Senior Vice President, Head of Retail Bank Segment Marketing, Indonesia
Citibank

Jake Wallis
President Director
Imperium Capital Indonesia

David Gormley
Deputy Chairman
NISP Asset Management

Maikel Sajangbati
Chief Executive Officer & Founder
MCI

9.40am Presentation Trusts v insurance as succession planning tools

Nigel Rivers
Global Head of Private Clients
TMF Group

- With the growth of private wealth, it is important to consider the best methods to maximise its preservation and planning for future generations
- There are various wealth planning tools that are available to achieve

effective wealth and succession planning objectives

- Two of these planning tools are: Trusts; and Life Insurance Policies (universal and asset wrap)
 - Often seen as competitors; are they friends or foe?
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9.55am

Presentation

Residence and citizenship planning - an overview

Juerg Steffen

Managing Partner, Singapore
Henley & Partners

- Reasons why wealthy people relocate
 - Reasons for an alternative citizenship
 - Current developments in investor immigration and alternative citizenship
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10.10am

Panel discussion

Families and their wealth - how can you serve them best?

- How can institutions create the right culture and commitment to service families' best?
- What is the connectivity between the business and family in terms of wealth management needs?
- How can you manage the different risk profiles between the business and the family?
- How can you provide relevant access to capital markets / other investment opportunities?
- What are the lending needs and options?
- What are the issues wealthy individuals & families in Indonesia should consider with regard to legacy, estate & succession planning, and tax planning?
- How can HNW and UHNW individuals structure their wealth from a tax perspective?
- How can they preserve wealth from one generation to the next?
- How do families retain wealth when the patriarch dies?
- How should families think about governance and structure of the family wealth?
- When they buy overseas property how should it be structured? What are the implications and impact in different countries?
- To what extent is citizenship increasingly important to Indonesian clients?
- What is the strategic value to banks and other providers of offering wealth planning-related products and services such as fiduciary structures and long-term planning solutions?
- When and how is it appropriate to engage product and service providers?
- What is the opportunity for wealth managers offering family office services in Indonesia?

Chair

Andrew Crooke

Editor
Hubbis

Panel members

Robin Amacher

Head of Business Development
Swiss Life

Nigel Rivers

Global Head of Private Clients
TMF Group

Juerg Steffen

Managing Partner, Singapore
Henley & Partners

Marcus Hinkley

Group Partner, Private Client, Singapore Office
Collas Crill

Michael Pfaar

Partner, Asia Pacific Leader - Deloitte Private
Deloitte & Touche

10.45am

REFRESHMENTS & NETWORKING

11.15am

Head to Head Q&A

Tackling the offshore challenge

Irene Lee

Business Development
Heritage Trust Group

A "live" Q&A on stage - to cover:

- In dealing with regulatory and compliance issues today - why are wealth managers finding it so difficult dealing with offshore companies?
 - How are some of these challenges going to develop?
 - Regulation of corporate service providers
 - What are the implications for the new EOI regime?
-

11.25am

Presentation

Chris Bendl

Chief Executive Officer & President Director
Manulife Indonesia

11.40am

Panel discussion

Cultivating Indonesia's insurance industry

- What are the challenges and opportunities for the insurance industry in 2014 and beyond?
- Where do you expect the biggest game-changers to come from?
- How is the role of insurance companies and products changing within Indonesian wealth management?
- How is the mix between the different distribution channels developing - IFAs, brokers, banks, agency forces, etc? How are models likely to evolve in the next few years?
- What is required to increase standards and levels of competency within the industry overall?
- How are you positioning your business to address these?
- Is there under-protection in Indonesia?
- How should insurance products be viewed, and used, appropriately within a wealth management context?
- What product developments are on the horizon / needed?
- What are the opportunities for product manufacturers as the distribution channels evolve?
- Does current regulation go far enough in terms of transparency and disclosure around fees? Where next?
- What is required to service the next generation and respond to the need for distribution across multiple channels?
- To what extent is the use of technology essential going forward?

Chair

Andrew Crooke

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Hubbis

Panel members

Chris Bendl

Chief Executive Officer & President Director
Manulife Indonesia

Edy Tuhirman

Chief Executive Officer
Asuransi Jiwa Generali Indonesia

Oemin Handajanto

President Director
Zurich Topas Life

Asri Natanegeri

Wealth Management - Bancassurance, Indonesia
DBS Bank

12.15pm

Presentation

Family wealth preservation and family governance

Dr Haji Abdul Aziz bin Hassan

Founder
Aziz Hassan & Co, Advocates & Solicitors

- Wealth preservation vs wealth distribution?
- Family governance - what it is and why is it important in wealth preservation?
- Wealth preservation structures: English law trusts vs Labuan Foundation

12.30pm

Presentation

Boosting sales and increasing client loyalty for wealth managers

Bert-Jan Van Essen

Co-Founder, Managing Director
Dragon Wealth

- Wealthy user behaviour is changing towards digital, and wealth managers are under pressure to deliver
- New technology enable wealth managers and their clients to make more confident investment decisions, increase sales and boost client loyalty by providing at-a-glance insight on investment behavior, peer group comparisons, products and investment information
- Banks should enables wealth managers and investors to access portfolio information, products, news and investor comparisons in and out the office through mobile phone or tablet
- These days apps are scalable enabling wealth managers to offer it to a small portion of their investors or their entire database
- As opposed to traditional IT apps costs less than what the average investor spends on coffee a month, is instantly installed, mobile, integration-free and customisable to a company's business and brand

12.40pm

Presentation

The regulatory and productivity benefits of a continuously trained workforce

Carsten Rosenkranz

Thomson Reuters

12.50pm

LUNCH

1.40pm

Panel discussion

Investment themes and product innovation

- What are the key investment themes for the rest of 2014 and into 2015?
- Where are clients putting their money at the moment?
- Product differentiation - what do investors want?
- Is there more interest in genuine diversification?
- How can investors more effectively diversify their portfolios?
- What is the potential for new asset classes, and new share classes to give investors a wider set of options?
- Assessing the role and suitability in Indonesia of ETFs, structured products and other market access products?
- How will product structures and offerings evolve?
- Where are the biggest gaps between overseas markets and Indonesia in

terms of the product offering?

- To what extent does regulation need to evolve in terms of the product offering?
- How might global market events impact Indonesian investments and opportunities in 2014?

Chair

Andrew Crooke

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Hubbis

Panel members

Agustinus Chandra

Investment & Bancassurance Product Head
Bank CIMB Niaga

Glant Saputra Hadi

Head, Wealth Management Product & Business Development
Bank Internasional Indonesia

Shan Saeed

Chief Economist
IQI Group

2.20pm

Presentation

Creating a new investment experience

Peter Williams

Director, Structured Solutions
Leonteq Securities (Singapore) Pte Ltd

- Leonteq Securities - an introduction: next generation structured products
- Are you selecting the right equities? What are the best performing equity funds in 2014 invested in?
- Smart Data: real-time client driven analytics comparing short and long-term trends

2.35pm

Panel discussion

Inside the asset management industry

- What will be the big trends in Indonesian asset management in the next 12 months? And over the next 3 to 5 years?
- Where do you expect the biggest game-changers to come from?
- What opportunities are expected from ASEAN fund passporting?
- What are the main challenges you foresee for the industry and wholesale distribution in Indonesia? How are you positioning your business to address these?
- There is a move internationally towards more guided architecture - what does this mean for Indonesia given the relatively narrow product offering?
- Is the asset management community launching enough products? And the right types of products?
- What are the effective ways to bring investment know-how and innovation to clients?
- What are the most effective ways to achieve differentiation by service, product, and in any other way?
- What are the struggles to sell and to select funds?
- What information do wealth management firms and product gatekeepers need to select the appropriate funds?
- How can the industry work better together to cater to investor appetite?

Chair

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Hubbis

Panel members

Denny Thayer

President Director & Chief Executive Officer
Trimegah Asset Management

Soni Wibowo

Research Director
Bahana TCW Investment Management

Riki Frindos

Chief Executive Officer, Indonesia
Eastspring Investments

3.15pm

REFRESHMENTS & NETWORKING

3.45pm

Panel discussion

Driving the digital revolution in wealth management

- What is the role of technology within Indonesian wealth management?
- How important is the customer experience? And how can it be improved?
- What are the processes, systems and technologies involved in creating leading offerings in Indonesia?
- What will be the challenges in implementing them?
- How are today's technology and systems-related needs and priorities likely to evolve?
- How can the basic infrastructure be industrialised to enable firms to focus on the value-add?
- Can any aspects of the platform be automated?
- How are emerging technologies reshaping the way banks connect with customers?
- What are the key digital trends and how do they impact the Indonesian wealth management industry?
- What does it take to leverage technology to drive customer acquisition and retention across multiple distribution channels?
- How can wealth managers create a competitive advantage through investment in technology and data-driven insights about customers?
- How can social media facilitate personalised customer engagement? To what extent can you reach new markets using social channels?

Chair

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Panel members

Ajay Mathur

Vice President Director, Consumer Banking Head, Indonesia
ANZ

Rian E. Kaslan

Executive Vice President, Head of Product, Service and Marketing
Commonwealth Bank

Bert-Jan Van Essen

Co-Founder, Managing Director
Dragon Wealth

Frank Maltais

Managing Director, Asia Pacific
Princeton Financial Systems

Jason Hoang

Managing Director, Asia
IRESS

4.25pm

Panel discussion

The evolution of wealth management - delivering advice that counts

- Is there a lack of real advice in Indonesia? How can this be changed / improved?
- To what extent does Indonesia need to review the distribution process?
- Is there too much churning in wealth management in Indonesia? How can you create a sustainable business?
- What is the best way to increase transparency over fees?
- What will it take for advisers to move it to the next level in terms of professionalism, quality of advice, product range and a fee-for-service model?
- How can you get advisers acting and behaving in the way you want, in terms of prospecting, managing clients, getting referrals, etc?
- What will it take to breed a bigger culture of learning among wealth managers?
- Can advisers make the shift from product to a more holistic offering?
- What are some of the most effective strategies to acquire clients? And then grow and retain them?
- What techniques do the best-performing advisers employ?
- How can you leverage your best performers? Especially to groom the next generation of talent?
- Given that deepening the talent pool remains a source of major concern and a big hurdle for industry players - what strategies do forward-thinking firms adopt?
- How can we get more capable, competent and enthusiastic young people to join this industry in the first place?

Chair

Andrew Crooke

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Hubbis

Panel members

Steven Suryana

Senior Vice President and Head of Wealth Management, Indonesia
HSBC

Tri Djoko Santoso

Chairman
FPSB Indonesia

Vera Margaret

Wealth Management & Private Banking Product Group Head, Preferred,
Private, Wealth Management & Consumer Liabilities
Bank CIMB Niaga

Arief Wana

Head of Sales
Ashmore Investment Management

5.00pm
FORUM ENDS
