Malaysian Wealth Management Forum 2012

hubbis

Thursday 28th June
Grand Millennium Kuala Lumpur

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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.

This is achieved through a highly-functional and relevant training and information portal – with a holistic suite of Wealth Management Training Modules and a cutting-edge Learning Management System – that enables relationship managers (RMs) and financial advisers to become more successful in the region's competitive landscape. And at the same time fulfill their continuing professional development obligations.

Our educational content and other tools are targeted, independent, timely, strategic and Asia-focused. The site is mainly focused on developing skills, product knowledge, and understanding.

Through this practical advice, analysis, insight and information, users gain what's necessary to offer suitable and trusted advice to their clients.

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Welcome

We are delighted to be hosting our 2nd annual **Malaysian Wealth Management Forum 2012** – to build on the success of our inaugural forum in Kuala Lumpur in June 2011.

It will include senior market participants from Malaysia and across Asia, with presentations and panel discussions on key issues, opportunities and challenges relating to people, processes, products, strategy and platforms.

Our ambition is to again get together the most influential participants in the domestic wealth management community.

Ultimately, this is designed for senior management, product gatekeepers and investment advisers - as well as key frontline staff and personnel in operations, technology, HR, compliance and other important roles at the top private banks, consumer banks, IFAs, securities firms, regulators, industry associations and other industry participants.

You can join us for either the morning or the afternoon segments - or can come along for the whole day. And we will give you a certificate to prove your attendance. Lunch is also included.

Key reasons why you will benefit from attending this forum:

- It is free for anyone at a private bank, a consumer bank, an independent advisory firm or any other type of wealth management organisation
- You get an authenticated certificate of attendance
- You learn about how international best practices in building winning wealth management businesses and platforms
- You get practical insight into how you can do your job more productively and efficiently
- You learn which products are suitable for your clients - and where they fit in their portfolio
- You can understand some of the latest industry and investment challenges - and how you can overcome them
- You can network with peers in an informal and independent setting
- It is an enjoyable and effective learning experience through being interactive and engaging

There are no non-sponsoring product manufacturers, professional services firms or vendors who can attend.

We look forward to seeing you at the event - and thank you for your support.

Michael Stanhope
Chief Executive Officer
Hubbis

Agenda at a glance

9.00am to 5.10pm	
TIME	**TOPIC**
9.00am - 9.05am	Welcome Address
9.05am - 9.50am	Panel Discussion Opportunities and challenges for wealth management and holistic advice in Malaysia
9.50am - 10.20am	Presentation What is the role of FX in a potential Euro crash?
10.20am - 10.50am	Presentation Efficient exposure to emerging markets via ETFs
10.50am - 11.10am	Refreshments & Networking
11.10am - 11.40am	Presentation Global fund movement and trend
11.40am - 12.10pm	Presentation Cross-asset hedging with volatility
12.10pm - 12.40pm	Presentation Why wealth planning is core to wealth management
12.40pm - 1.25pm	Lunch
1.25pm - 2.15pm	Panel Discussion The inter-generational wealth shift: trends and developments in wealth planning
2.15pm - 2.45pm	Presentation The neglected asset class: human capital
2.45pm - 3.15pm	Presentation Creating and managing customers' expectations
3.15pm - 3.35pm	Refreshments & Networking
3.35pm - 4.20pm	Panel Discussion Building a world-class wealth management business
4.20pm - 4.45pm	Presentation Sales skills: developing a strategy for how we grow our business
4.45pm - 5.10pm	Presentation How to build a market-leading technology platform in wealth management
5.10pm Close	Forum Ends

Agenda

8.40am **Registration**

9.00am **Welcome Address**

Andrew Crooke
Editor
Hubbis

9.05am **Panel Discussion**
Opportunities and challenges for wealth management and holistic advice in Malaysia

- Where is the wealth management industry at in Malaysia?
- How is the domestic regulatory environment developing in relation to wealth management and private banking?
- What more can be done to further “clean” the market?
- What is the potential for fee-based models? Would this be a good thing?
- New product trends and developments – what’s needed and what’s next?
- What needs to be done to reduce HNW Malaysian investors from having their wealth managed offshore?

Chair

Andrew Crooke
Editor
Hubbis

Panel Members

Ronnie Lim
Head, Consumer Banking
Alliance Bank Malaysia

Choong Wai Hong
Head of High Networth and Affluent Banking
Maybank

Robert Foo
Managing Director, MyFP Services
Member of the Board of Governors, Financial Planning Association of Malaysia

Paul Khoo
Chief Executive Officer
Standard Financial Planner

Michael Stanhope
Chief Executive Officer
Hubbis

9.50am	**Presentation** **What is the role of FX in a potential Euro crash?** **Jonathan Lee** Vice President, Investment Solutions CIMB Private Banking - How can FX reduce volatility in your portfolio? - How to use currency investments to balance your portfolio
10.20am	**Presentation** **Efficient exposure to emerging markets via ETFs** **Anson Chow** Representative, db-X, Asia Deutsche Bank - ETF market trends - Assessing investment vehicles and replication techniques – pros and cons of different wrappers - Considerations of legal constraints - Considerations of liquidity constraints - Considerations of tax constraints
10.50am	**Refreshments & Networking**
11.10am	**Presentation** **Global fund movement and trend** **Xav Feng** Head of Asia Pacific Research, Lipper Thomson Reuters - UCITs fund sales cross border - Global fund flows and movement - The next global fund trend
11.40am	**Presentation** **Cross-asset hedging with volatility** **Chan Ahn** Head of Equity Derivatives Structuring, Asia ex Japan JPMorgan - Case for cross-asset hedging and using volatility as a cross-asset hedging tool - Hedging equities and other asset classes - How to set up a cross-asset hedge - Advantages and trade-offs of cross-asset hedging - Dealing with the trade-offs of cross-asset hedging

Agenda

12.10pm **Presentation**
Why wealth planning is core to wealth management

Nigel Rivers
Managing Director, Hong Kong, and Regional Director of Private Clients, Asia Pacific
TMF Group

- Why wealth planning matters
- Why everyone should plan
- What can go wrong if they don't plan
- What are the common wealth planning tools and how to use them effectively
- How to implement wealth planning in practice – and what are the challenges to address

12.40pm **Lunch**

1.25pm **Panel Discussion**
The inter-generational wealth shift: trends and developments in wealth planning

- What are the key trends and emerging issues in wealth planning in Malaysia today?
- To what extent is inter-generational wealth transfer influencing how HNW clients are thinking about how they manage and plan their wealth?
- What new solutions are suitable given the need to tackle issues relating to family businesses and succession planning?
- Myth-busting – what common misconceptions about wealth planning need to be addressed to encourage more proactive conversations between advisers and clients?
- What creates value for clients and bankers?
- Can clients really engage and prepare the next generation?
- To what extent will the increasingly-complex tax, cross-border and wealth planning issues that clients face drive a wedge between firms who offer the right solutions, and those which do not?
- How do you expect the market for wealth planning to evolve in 2012 and beyond?

Chair

Andrew Crooke
Editor
Hubbis

Panel Members

Carolyn Leng
Head of Private Banking
CIMB Private Banking

Joshua Lim
Head of Wealth
AmBank Group

Alvin Yap
Principal Consultant & Managing Director
AD Financial

Nigel Rivers
Managing Director, Hong Kong, and Regional Director of Private Clients, Asia Pacific
TMF Group

2.15pm **Presentation**
The neglected asset class: human capital

Sunny Ng
Director of Fund Research, Asia
Morningstar

- Human capital implications on asset allocation
- Managing human capital risk
- Liability-driven investing

2.45pm **Presentation**
Creating and managing customers' expectations

Tan Beng Wah
Chief Executive Officer
CIMB Wealth Advisors

- The most common misconception about investments among customers
- The need to educate customers to have the right expectations
- The right approach to managing customers' expectations

3.15pm **Refreshments & Networking**

3.35pm

Panel Discussion
Building a world-class wealth management business

- How can wealth management firms differentiate their offerings given increasing competition and challenges of tougher regulation?
- Are firms really prepared to make the required commitment to growing a wealth management business until they can make a profit, given this will likely take many years?
- What are the component parts of getting your value proposition and client experience right?
- What is the real differentiator – product, systems, process, people or culture?
- What technology is needed to provide an effective solution for clients?
- What are the industry best practices in more developed wealth management markets in Asia, especially Hong Kong and Singapore, and globally?
- What are the processes, systems and technology involved in creating leading offerings in these markets?
- Where are the biggest gaps between overseas markets and Malaysia in terms of the product offering?
- What lessons can be applied in the Malaysian context?

Chair

Andrew Crooke
Editor
Hubbis

Panel Members

Tan Beng Wah
Chief Executive Officer
CIMB Wealth Advisors

Anthony Siau
Head, Strategic Business & Market Development
RHB Investment Management

Dr Fred Davies
CEO and Chairman
Insa Software

Reto Merazzi
Managing Director and Head of Technology Solutions
Hubbis

Mykolas Rambus
Chief Executive Officer
Wealth-X

Kee Cha Au
Head, Consumer Banking, Investments
Alliance Bank Malaysia

4.20pm	**Presentation** **Sales skills: developing a strategy for how we grow our business** **David MacDonald** Managing Director and Head of Consulting & Learning Solutions Hubbis - The challenges we face in growing our business - Being different, being professional, being strategic - Developing a sales strategy – routes to market - Developing a sales plan – turning thinking into action - Developing existing client relationships – gaining quality referrals - Developing networks through centres of influence	
4.45pm	**Presentation** **How to build a market-leading technology platform in wealth management** **Reto Merazzi** Managing Director and Head of Technology Solutions Hubbis - What do technology platforms at the world's biggest and best private banks look like? - What are the components of a high-quality, reliable and efficient technology platform - from front to back? - How can you put this into practice? - Common implementation challenges - and how to address them - Why technology is critical to your future success	
5.10pm	**Forum Ends**	