

5th Annual Private Wealth Management Forum Asia

Going back to basics and re-orienting the business model to rebuild client trust

**Save
US\$300**

**Book before
9 October
2009**

(see back page
for details)

- **Management and client-facing strategies for rebuilding client trust**
- **Re-orienting the business platform in light of regulation**
- **How are boutique banks and local banks pursuing the opportunities?**
- **Investment trends in tough times – reshaping your clients' portfolio**



Featuring key speakers including:

- **Kathryn Shih**, CEO Wealth Management Asia Pacific, UBS AG
- **Anuj Khanna**, Head of Private Banking, North Asia, Credit Suisse
- **Lok Yim**, Head of North Asia, Private Wealth Management, Deutsche Bank
- **Joanna Chu**, Head of North Asia, Barclays Wealth
- **David Hansson**, Head of Equity Derivatives Marketing Asia Ex-Japan, J.P. Morgan
- **Renato de Guzman**, Chief Executive Officer Asia Pacific, ING Asia Private Bank
- **Eng Huat Kong**, Managing Director, Global Wealth Management, Merrill Lynch International Bank
- **Peter Flavel**, Global Head, The Standard Chartered Private Bank
- **Bruce VonCannon**, Chief Representative, Banque Privée Edmond de Rothschild SA
- **Carol Pepper**, Chief Executive Officer and Founder, Pepper International LLC
- **Christian Stewart**, Managing Director, Family Legacy Asia (HK) Limited

www.euromoneyseminars.com/PWMAAsia09

Sponsor:



Media partners:



Online media partner:



5th Annual Private Wealth

Asia-Pacific's high net worth individuals are forecast to have about **\$9 trillion** worth of assets in 2009, and despite losing 22.3% during this economic downturn, are expected to **overtake North America by 2013** in terms of the world's most prosperous region.

The sting of the financial crisis has led banks and regulators to move back to basics. And in the Private Wealth sector, rebuilding trust and client portfolios are top priority.

Euromoney Seminars' **5th Annual Private Wealth Management Forum Asia** is an opportunity for CEOs of private banks, boutique banks and family offices to come together with structured products specialists, business operations specialists, independent trustees and lawyers to discuss how to best serve their clients in the current environment.

Key issues to be discussed include:

- **Industry best practice** – learn from the best CEOs in the industry about their approach to wealth management, investment and building a business platform
- How are **regulators building a coherent policy framework** around private banks and how can their efforts shape your strategy?
- How are **boutique banks capitalising on the flight to safety** and how can they retain clients who have moved from other banks?
- Wealth preservation and when to cash in – **investment strategies** and asset classes that will help you rebuild client wealth and trust
- How can you take advantage of the **growing sophistication in succession planning** and where are the pitfalls when building a trust for clients?

This is an opportunity for you to shape business strategy and exchange ideas and perspectives with other industry players at this pivotal time. The world has changed and the industry is changing with it – will you be a part of the rebuilding process?

We look forward to welcoming you to Hong Kong in November.

www.euromoneyseminars.com/PWMAAsia09

Day One: Monday, 23 November 2009

08:30

Registration and morning refreshments

09:00

Chairman's opening remarks

09:15

Keynote address: Overcoming challenges for the Asian private banking industry

- Trends in Asia's private banking industry in extraordinary market conditions
- Challenges for safeguarding your clients' wealth under the current market conditions
- Generating new clients amidst the intense competition
- Tapping the emerging private wealth of China and India

Kathryn Shih, CEO Wealth Management Asia Pacific, **UBS AG**

09:45

Keynote address: Management strategies for rebuilding client trust

- Client behaviour patterns over the last year
- Looking at the global, regional and local scales
- Which strategies fit which type of client?
- How can diverse local strategies be coordinated on a regional level?

Anuj Khanna, Head of Private Banking, North Asia, **Credit Suisse**

Euromoney Seminars is a division of Euromoney Institutional Investor (Jersey) Limited.

10:10

Private bankers panel: How has business best practice developed?

- Developing a new private banking model in the face of new regulation and current market conditions
- Generating and retaining your clients
- Strategies for rebuilding client trust
- Fee structures – balancing a fee-based and a transaction-based model
- How to reconcile client and shareholder needs
- Dealing with reputational risks
- What skills are required to become a trusted advisor?
- How can private banks encourage and nurture new talent?
- Inorganic growth vs. organic growth models

Bruce VonCannon, Chief Representative,
Banque Privée Edmond de Rothschild SA

Eng Huat Kong, Managing Director, Global Wealth Management,
Merrill Lynch International Bank

Joanna Chu, Head of North Asia, **Barclays Wealth**

Peter Flavel, Global Head, **The Standard Chartered Private Bank**

Renato de Guzman, Chief Executive Officer Asia Pacific,
ING Asia Private Bank

Loak Yim, Head of North Asia, Private Wealth Management, **Deutsche Bank**

10:55

Morning coffee break

11:35

Understanding different fund strategies and doing appropriate due diligence on behalf of clients

- What is the new landscape of the funds sector?
- Diversification vs. specialisation strategies
- Putting your clients mind at rest – how can private banks do due diligence on funds?
- How can funds help a portfolio in times of volatility?
- Identifying good fund management and good fund managers

12:05

Wealthy investors post meltdown: A return to liquidity

- Effect of the crisis on the psyche of High Net Worth investors
- Asset allocation revisited post meltdown – new paradigms
- The new focus on old favorites: cash, bonds and gold
- Reintroducing risk strategies into client portfolios – what makes sense going forward
- Reengaging High Net Worth clients-how to rebuild trust

Carol Pepper, Chief Executive Officer and Founder,
Pepper International LLC

12:50

Lunch

14:10

Is the downturn an opportunity for boutique private banks?

- Where are their new clients coming from?
- How can boutique banks differentiate themselves?
- Trends in open architecture and what that means for boutique banks
- Getting access to products

Bruce VonCannon, Chief Representative,
Banque Privée Edmond de Rothschild SA

Health Management Forum Asia

14:40

Panel discussion: Institutionalisation of wealth through family offices

- Growth markets in Singapore and Hong Kong
- Who is providing client services – private banks or independent offices?
- How price sensitive is the market for family offices?

Christian Stewart, Managing Director, **Family Legacy Asia (HK) Limited**

Roy Chen, Chairman & CEO, **Grace Financial Limited**

Carol Pepper, Chief Executive Officer and Founder, **Pepper International LLC**

15:30

Afternoon tea break

16:00

Winning local Asian clients in the current climate

- Has moving onshore as a growth strategy worked?
- Client driven collaboration with other private banks
- How important is brand name and service?
- Organic vs. inorganic growth

Stephen Richards Evans, Regional Head,

The Standard Chartered Private Bank, North East Asia

16:30

Responding to risk aversion of trustees

- Different approaches to risk aversion
- What can be included in a trust?
- How can independent trustees differentiate themselves from big private banks?
- How is documentation being tightened up to define responsibility for risk?
- The complications of including entrepreneurial activities in trusts

Samantha Bradley, Partner, **Withers Worldwide**

17:00

Chairman's closing remarks followed by drinks reception

Day Two: Tuesday, 24 November 2009

08:30

Morning refreshments

09:00

Chairman's opening remarks

09:15

The future of structured products – trust, transparency and trends

- Growth, fall and rebound of structured products volumes globally
- Demand and regional differences in Asia with a global perspective
- Responding to a greater awareness of counter-party risk
- How will flow products generate revenue?
- The need for transparency
- What does the future hold for structured products as an asset class?

David Hansson, Head of Equity Derivatives Marketing Asia Ex-Japan, **J.P. Morgan**

09:45

Panel discussion: Niche markets – making money in unexpected ways

- Predicting trends in niche markets
- Exploiting illiquid market conditions through niche investments?
- How can niche and highly specialised products fit into a portfolio?
- Can specialised products really be structured so they are crisis proof?
- What to look for when investing in a specialised niche fund

Manuel Gerber, Art Market Investment Advisor

Andrew della Casa, Director, **The Wine Investment Fund**

10:15

Trends and core issues in succession planning

- What is succession planning?
- Dealing with governance issues
- Tax issues when the family is a multinational family
- What can go wrong?
- The issues when the business is included in the trust
- Avoiding disputes and dealing with them when they do arise

Mimi Hutton, Partner, **Withers Worldwide**, Head of Hong Kong Branch, **STEP**

10:45

Morning coffee break

11:10

What are the effects of compliance and regulation on reshaping the business platform?

- The importance of a well-informed and competent marketing officer
- Policy reactions to the Lehman Brothers bankruptcy
- Hong Kong working group results
- What are the internal shifts within private banks?
- Clarification of liability documentation

11:40

Tax considerations in wealth management for non-resident Indians

- How will the new OEDC tax regulations impact Asian private wealth?
- Establishing the objectives of clients
- Identifying the correct tools and using them effectively
- What has to be considered when managing both onshore and offshore wealth?

12:15

Chairman's closing remarks and close of conference followed by lunch

TO REGISTER:



: www.euromoneyseminars.com/PWMAAsia09



: registrations@euromoneyasia.com



:(HK) +852 2842 6995 /
(UK) +44 20 7779 8999

Registration Fees

	Standard Conference Fee	Early Registration Fee (before 9 October 2009)
One Delegate	<input type="radio"/> US\$1,999	<input type="radio"/> US\$1,699 (save US\$300)

Please quote EAE189 on all correspondence

5 Easy Ways To Register

Online:
www.euromoneyseminars.com/PWMAAsia09

Email:
registrations@euromoneyasia.com

Fax:
(HK) +852 2111 1400 / (UK) +44 20 7779 8603

Telephone:
(HK) +852 2842 6995 / (UK) +44 20 7779 8999

Post:
Olivia Wong
Euromoney Seminars
Euromoney Institutional Investor (Jersey) Limited
7/F Printing House
6 Duddell Street
Central, Hong Kong

Delegates

Delegate 1 (please print)

Title (Mr/Mrs/Miss/Dr/Other):
Name:
Position:
Company:
Address:
Postcode:
Country:
Tel:
Fax:
Email:

The information you have provided will be safeguarded by Euromoney Seminars who will use it to keep you informed of relevant Seminars in the future. Please tick how you would prefer to receive future information Mail ☐ Fax ☐ Email ☐ and fax back this form to UK +44 (0)20 7779 8603. We may wish to make your details available to sponsors of this particular event, or to other reputable organisations who may wish to contact you. Please tick this box ☐ if you would prefer your details

Delegate 2 (please print)

Title (Mr/Mrs/Miss/Dr/Other):
Name:
Position:
Company:
Address:
Postcode:
Country:
Tel:
Fax:
Email:

to remain confidential and fax back this form to UK +44 (0)20 7779 8603. Euromoney Seminars is part of the Euromoney Institutional Investor PLC Group, who may also use your data to keep you informed of relevant products and services both domestically and internationally. If you object to being contacted by telephone ☐ fax ☐ or email ☐ in respect of this, please tick the relevant box and fax back this form to UK +44 (0)20 7779 8603.

Payment

Payment can be made in one of four easy ways – please tick the appropriate box.

☐ Payment by Bank Transfer

Bank transfer quoting EAE189
Beneficiary: Euromoney Seminars
Account No: 808-172159-001 (HKD), 808-172159-201 (USD),
808-172159-276 (GBP)
Swift Code: HSBCHKHKKH
HSBC Limited, HSBC Main Building, No.1 Queen's Road, Central, Hong Kong

☐ Please debit my credit card:

To make a payment by credit card, please call (HK) +852 2842 6955 / (UK) +44 20 7779 8557 or visit www.euromoneyseminars.com to book and pay online

Please note that in completing this booking form your undertake to adhere to the cancellation and payment terms listed below.

Signature:	Date:
Approving Manager:	
Position:	

Administrative Information

Venue:
Renaissance Harbour View Hotel
1 Harbour Road
Wanchai
Hong Kong
Tel: +852 2802 8888
Fax: +852 2802 8833

Travel & Accommodation:
Euromoney Seminars has negotiated a special group rate at the Renaissance Harbour View Hotel for conference attendees. Full details will be provided with the joining instructions sent on receipt of booking. If you have any questions in this regard, please contact Karen Au, Logistics Manager on (HK) +852 2842 6955 or email karen.au@euromoneyasia.com.

Cancellation policy: If you cannot attend you must cancel your registration in writing by 6 November 2009 to receive a refund less a 10% administration charge. We cannot accept verbal cancellations. **Cancellations received after 6 November 2009 are liable for the full conference fee.** We suggest you send a substitute to attend in your place at no extra charge.

Registration fee: The registration fee includes participation in the conference, lunch and documentation material, which will be distributed at the beginning of the event. All bookings are considered binding on receipt of the booking form.

Cannot attend? Please pass this brochure on to a colleague or you can purchase the documentation for US\$599

For immediate information on this and related events, please call our hotlines

Telephone: (HK) + 852 2842 6995
or (UK) +44 20 7779 8999
or USA toll free (free from within the USA)
(USA) +1 800 437 9997
or (USA) +1 212 224 3570
or alternatively email:
hotline@euromoneyplc.com

For further information on sponsorship or exhibition opportunities please contact Emma Donald, Tel: (HK) +852 2842 6946, Fax: (HK) +852 2111 1400, email: emma.donald@euromoneyasia.com