Private Banking: Switzerland 2016 Conference and Awards Conference Agenda



08:00-09:00

Coffee & Registration – Century Foyer

09:00-09:05

Chairperson's welcome and scene setting

Meghna Mukerjee, Editor, Private Banker International

PRIVATE BANKER

SESSION ONE: The Private Banking Landscape in Switzerland

09:05-09:30

Keynote Presentation - UBS



Paul M. Raphael, Head Wealth Management, Europe & Emerging Markets, **UBS**



09:30-09:50

How Digital can Change the Banking Model

- Customer needs in a digital world
- Technology as key enabler to grow in Swiss private banking
- The paradigm of industrialisation
- Leveraging ecosystems to succeed in digital banking

Michael Rogenmoser, General Manager Switzerland & Liechtenstein, Avalog QVQ QQ



09:50-10:10

Growth in Private Banking

- Developments in Swiss private banking: overview on key figures and the private banking landscape
- UBP and its acquisitions in private banking: overview on UBP's financial foundations and acquisitions since 2000
- Growth drivers: organic vs. inorganic growth and its main drivers
- Success factors of acquisitions

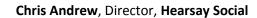


10:10-10:30

Peter Schmid, CEO, UBP Zurich

The Rise of the Digitally Enabled Advisor - Leveraging Social, Web, SMS and Emails to Drive Engagement

- The world has gone digital and old ways of prospecting are not working
- Increasing regulations are placing more burden on companies
- How can companies empower their advisors to become smarter about their clients and grow more business in 2016?







10:30-10:50 Speaker Discussion and Audience Q&A



Panellists include:

Henrik Herr, Head IWM Germany & Austria, Credit Suisse AG

Michael Rogenmoser, General Manager Switzerland & Liechtenstein, Avalog

Chris Andrew, Director, Hearsay Social

Peter Schmid, CEO, UBP Zurich



Networking Coffee Break - Century Foyer 10:50-11:20



SESSION TWO: What is Driving Profitability and Customer Centricity Today?



Chairperson: Oliver Williams, Head & Co-Founder, WealthInsight

WEALTHINSIGHT

11:20-11:40 From Single Products Towards Holistic Advice

- Adapting to new customer behaviour and demands
- The 'client's balance sheet'
- Where is the money?
- The rise of socially responsible investments



Philipp Rickenbacher, Member of the Executive Board & Head Advisory Solutions, **Bank Julius Baer**



11:40-12:00 Harnessing Disruption to Succeed in the Swiss Market

- Technology driving the evolution of the banking and wealth management business
- Increasing client expectations on digitisation
- Bridging technology and business



Ton Kentgens, Global Business Development, Private Wealth Management, **Ortec Finance**



12:00-12:20 Opportunities and Challenges of Cross Border in Wealth Management Industry

- A complex environment
- A strong impact on Swiss banks
- Strategic refocus?



Pierre Vrielinck, CEO Wealth Management Switzerland & Emerging Markets, **BNP Paribas**



12:20-12:40 Tapping into Alternative Investments

- Meeting the desires of high net worth individual (HNWI) clients
- How do alternative investments differ from traditional investments?
- What are the benefits to wealth managers?
- Easy and secure trading offer

Paul Hewitt, Head of Client Strategy EMERI Chairman's Office, Christie's



12:40-13:00 Speaker Discussion and Audience Q&A

Panellists include:

Pierre Vrielinck, CEO Wealth Management Switzerland & Emerging Markets, **BNP Paribas**





Paul Hewitt, Head of Client Strategy EMERI Chairman's Office, Christie's

Hans-Peter Borgh, Global Head of Wealth and Investment Management, **Banque Internationale à Luxembourg**



Ton Kentgens, Global Business Development, Private Wealth Management, **Ortec Finance**



13:00-14:00 Networking Lunch – Century Foyer



SESSION THREE:

From Traditional Wealth Sanctuary to Modern Wealth Management Hub



Chairperson: Stefan Becker, Managing Partner, Juna Asset Management



14:00-14:20

The Great Intergenerational Wealth Transfer - Tides of Change

- The importance of catering to the digitally savvy next generation's needs
- Right segmentation for the right results
- The rise of robo-advisors can they compete with traditional wealth managers?



Karen Aslanian, Executive Vice President, **Lombard Odier Darier Hentsch** & Cie



14:20-14:40

How Digital Natives Interact with Private Banks in the Near Future

- Rise of new technologies for customer contact: chat, chat bots, voice controlled devices
- Seamless user journeys for private banking clients across these channels, with a human touch
- Case study: chat based user interaction for robo advisory



D.P. Kruyswijk, Digital Finance Strategist, Virtual Affairs Switzerland



14:40-15:00

Data as a Differentiator

- Data capabilities that you need to enable your digitalisation program
- Why data is key in the regulatory environment the impact of GDPR
- Case studies: conduct risk, single client view, customer insights, advanced methods



Christian Westermann, Partner, PwC



15:00-15:20 The Next Wave of Digital Investors and the Role of Roboadvisors

- Transformation of wealth management
- The effect inter-generational change
- Hybrid-roboadvisors
- TechRules solution



Javier Carrallo, Business Development Manager, **TechRules Financial Solutions**



15:20-15:40

Speaker Discussion and Audience Q&A

Panellists include:

Karen Aslanian, Executive Vice President, Lombard Odier Darier Hentsch & Cie



LOMBARD ODIER

Christian Westermann, Partner, PwC

Javier Carrallo, Business Development Manager, TechRules

Financial Solutions

D.P. Kruyswijk, Digital Finance Strategist, Virtual Affairs



15:40-16:00

Networking Coffee Break – Century Foyer



SESSION FOUR: Future Focus - Private Banking in Switzerland in 2017 and Beyond



Chairperson: Ian Woodhouse, Director, PwC



16:00-16:20

Key Future Developments in Private Wealth



- The challenges boutique banks and family offices face in Switzerland
- Impacts of regulation, technology and the evolving customer
- Defining best practices for sustained success

Ray Soudah, Chairman & Founding Partner, MilleniumAssociates AG



16:20-16:40

Maintaining Switzerland's Reputation as a Key Wealth Hub

- Identifying potential future challenges
- Being strategic and tactical in catering to local and international wealth
- How Switzerland can maintain its one-of-a-kind allure as a private banking centre
- Understanding Switzerland's unique position as a global wealth hub still number one?

Gavin Rankin, Head of Managed Investments, Citi Private Bank, EMEA



16:40-17:20

Expert Panel: Where is Swiss Private Banking Now and Where Does it Need to be Tomorrow?

Experts from private banks, family offices and consultants will discuss and debate how Switzerland can remain a key player in the industry

Discussion points include:

- How can the rest of Europe learn from Switzerland?
- How will private banking hubs be affected by Brexit
- Lessons learned and key takeaways from today's presentations
- Building a roadmap for 2017 and beyond



Panellists include:

Jürg Hunziker, Group Chief Markets Officer and Deputy Group CEO, Avalog





Gavin Rankin, Head of Managed Investments, Citi Private Bank, EMEA



Roger Lehmann, Business Head Switzerland, Member of the Executive Committee, **HSBC Private Bank**

Private Bank millenium

associates

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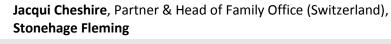
Ray Soudah, Chairman & Founding Partner, MilleniumAssociates AG

SOCIETE GENERALE
Private Banking



Tobias Wagner, Head of Zurich Branch & Member of the Executive Committee, **Societe Generale Private Banking Switzerland**





17:20-17:30 Closing Remarks, Close of Conference followed by Drinks Reception – Century Foyer

19:00 Gala Dinner and Awards Ceremony – The Century