

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
INTERNATIONAL

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, **Avaloq**



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



Peter Schmid, CEO, **UBP Zurich**



UNION BANCAIRE PRIVÉE

10:10-10:30 **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?



Chris Andrew, Director, **Hearsay Social**



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, **Avaloq**

Chris Andrew, Director, **Hearsay Social**

Peter Schmid, CEO, **UBP Zurich**



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UNION BANCAIRE PRIVÉE

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

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**

Julius Bär

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**



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**



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**



Christian Westermann, Partner, **PwC**



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



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, **Avaloq**



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



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



Ray Soudah, Chairman & Founding Partner, **MilleniumAssociates AG**



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



Jacqui Cheshire, Partner & Head of Family Office (Switzerland), **Stonehage Fleming**



17:20-17:30

Closing Remarks, Close of Conference followed by Drinks Reception – Century Foyer

19:00

Gala Dinner and Awards Ceremony – The Century