The Private Banking Conference & Awards: London 2014
Gibson Hall, London, UK
4th June 2014

The Private Banking Conference & Awards: London 2014 brings together private banks, family offices, independent wealth managers and intermediaries for a discussion of the key issues facing the industry. Leading sector thinkers and doers will meet to debate the strategies and share their business practices aimed at meeting the challenges of implementing innovative technological solutions, creating better client experiences, overcoming competition and ensuring thorough regulatory compliance. The informative and inspiring keynote sessions and informal conversations provide the setting for you to join other high-profile event guests in engaging conversations.

C-level speakers will look at the major trends in the global private banking and wealth management industries such as strategic cost cutting through M&As and opportunities created during market consolidation. The CEO-Forum at the end of the conference provides space for a top-level conversation and asks important questions about London's position among the global wealth capitals. How can the city leverage its significant internal resources to achieve a higher profile with international clients?

The conference invites speakers, participants and partners to consider and find practical solutions to the most pressing industry questions:

- How is regulation driving the change in the industry practices?
- How are industry leaders tackling new challenges in the converging market conditions?
- How to meet the demands of a new generation of tech-savvy investors?
- How to develop your organisation's talent to nurture future-proof skills and knowledge?
- How is the emerging market investment growth influencing established territories?
- How to run a sustainable and profitable private banking operation in difficult economic conditions?
- How to achieve competitive advantage through scaling operations and refocusing on the key markets?

The Private Banking Conference & Awards: London 2014 leverages the expertise across the Progressive Digital Media research and publishing portfolio, including Private Banker International, Wealth Insight and Spears. The event is an opportunity to share ideas, discover trends and network with peers across the wealth industry, while enjoying exclusive research and case studies delivered by the wealth industry thought leaders.

PRIVATE BANKER INTERNATIONAL

THE PRIVATE BANKING CONFERENCE AGENDA

08:30-09:00	Networking Coffee
Session One	**The State Of Private Banking: Retaining London's Status At The Top Of The List Of Global Wealth Management Centres**
09:00-09:10	**Chairman's Introduction** **John Evans** Editor at Large **Private Banker International**
09:10-09:30	**Opening Keynote** **Lord Waldegrave** Chairman **Coutts**
09:30-09:50	**The Importance Of Rebuilding Confidence And Trust In The Financial Services Sector In Support Of Economic Growth** • Client trust has been low for 5 years, with clients demanding honesty and transparency together with more personalisation, but is the tide of trust beginning to turn? • Legacy issues and a rising tide of regulation are distracting the industry, what is the response? • Everyone talks about being client centric, but most lose sight of what it actually means **James Fleming** CEO **Arbuthnot Latham & Co. Limited**
09:50-10:10	**Private Banking Industry Consolidation** • Industry consolidation within private banking • Drivers and trends • M&A case: acquisition of Credit Suisse domestic private banking activities in Germany **Jeroen Rijpkema** CEO **ABN AMRO Private Banking International**
10:10-10:30	Panel Discussion
10:30-11:00	Networking Break – Sponsored by Avaloq

Session Three	**Streamlining Processes and Increasing Client Efficiency**
Session Two	**Future Focus: Innovative Strategies Driving Growth In Private Banking**

11:00-11:20 **Strategies To Benefit From Market Conditions**

- Running sustainable and profitable private banking operations in difficult economic conditions
- The impact of acquisition on the business: increase in AuM, effect on margin, positive market performance
- Enhancing global presence through M&A: capitalising on the growth momentum in emerging and established markets

Adam Horowitz
CEO
Julius Baer International UK Ltd.

11:20-11:40 **How To Meet The Demands Of A New Generation Of Tech-Savvy Investors**

- Today's approach to wealth is more tech-savvy, involved and active than in the past - moving away from old models and stereotypes
- "Mobile revolution" has been seen as one of the stronger financial sector trends in recent times
- How to keep up with the evolving needs and expectations of clients
- What are banks doing to keep up with this trend

Dena Brumpton
COO
Citi Private Bank

11:40-12:00 **Managing Consolidation, Managing Innovation, Managing Compliance: Why Talent and Skills Play the Crucial Role in Identifying the Market Leader of Tomorrow**

- What are the key external drivers reshaping the industry, regulation, client?
- What is the impact on growth, margins and in client relationship management practices
- What will the leaders of tomorrow look like and how will they manage the changes: findings from latest PwC Global Private Banking and Wealth Management Survey

Ian Woodhouse
Director, Private Banking and Wealth Management
PWC

12:00-12:20 **How Goal Based Financial Planning Can Help With Implementing Regulatory Compliance**

- Goal Based Financial Planning as a tool to help clients reach their financial goals
- Making regulatory compliance a positive instead of a negative topic
- Fully supported by innovative tooling

Ton Kentgens
Global Business Developer
Ortec Finance

12:20-12:40	Panel Discussion
12:40–13:40	Networking Lunch

13:40-14:00	**Catering For A New Generation Of Investors: Re-Focusing On Offering Sustainable Investments**

- Sustainable investments: High on the agenda of the up and coming generation of investors, the decision makers of the future
- Sustainable outlook on portfolio construction approaches: How to understand your client's ethical investment needs and preferences
- How have the methods of implementation within sustainable investment portfolios evolve over the last decade?

George King
Managing Director, Head of Portfolio Strategy
RBC Wealth Management

14:00-14:20	**Technology First: Why Mastering New Technologies Determines the Scale, Speed and Success of your Organisation's Change Programmes**

- Putting technology upgrade at the heart of organisational change to enable a unified communication strategy
- Internal transformation: How to upskill your team to efficiently manage new regulatory requirements
- Refreshing your brand: Balancing historic heritage with modern business values and practices

Annamaria Koerling
Head of Wealth Management
C. Hoare & Co

14.20-14:40	**How Can Custodians Reduce Risk And Enhance Efficiency In Family Offices?**

- What data and information risks do family offices face?
- How can technology support family office functioning?
- How can providers win family office business?

Rupert Phelps
Director of Family Office Services
BNY Mellon Wealth Management

14:40-15:00	**The Challenge Of Increasing Client Advisor Efficiency And Capacity, Whilst Also Increasing Client Engagement In A Changing Regulatory Environment**

- How effective implementation of CIO Office and house view will increase clients risk adjusted return in both advisory and discretionary portfolios
- Using technology to increase client engagement and deepen CA/client relationships
- How Client Advisors delivers personalised advice empowered by a global infrastructure

Nick Tucker
Head of UK Domestic
UBS Wealth Management

15:00-15:30	**Panel Discussion** Speakers joining for discussion:

Peter Dingomal Head of Business Development **Avaloq UK**	**Simon Cadbury** Head of Strategy and Innovation **Intelligent Environments**

15:30-16:00	Networking Break

Session Four	CEO Forum: Exclusive Executive Debate
16:00-16:45	**The Future of London as a Global Private Banking and Wealth Management Capital** • How is the changing regulation affecting London's position as a global wealth management centre? • What key conditions determine a location's success in attracting investments from private banking clients? • What trends and innovations is London leading the world at and what are we to expect in the future? • How is the capital going to respond to increasing competition from other world private banking centres and what is the role of banking industry leaders in maintaining London's status? **Jeroen Rijpkema,** CEO **ABN AMRO Private Banking** **Adam Horowitz,** CEO **Julius Baer International UK Ltd.** **James Fleming**, CEO **Arbuthnot Latham** **Nick Tucker,** Head of UK Domestic **UBS Wealth Management** **Eric Barnett,** Group Chief Executive **Societe Generale Private Banking Hambros**
16:45-17:00	**Chairman's Summary** **John Evans** Editor at Large **Private Banker International**
17:00-19:00	**The Private Banking Awards Reception**