

Private Banking: London 2015

3rd June 2015 | Waldorf Astoria | London, UK
Conference & Awards

Private Banking: London 2015 asks important questions about the future of private banking in the face of a dramatically changing landscape: regulatory updates, new market players, consumer behavior, the rise of online & mobile private banking and the UK's position among the global wealth capitals.

Key industry thinkers and doers will meet to debate, discuss and discover practical solutions to the most pressing industry questions:

- How are industry leaders tackling new challenges in the converging market conditions?
- How to meet the demands of a new generation of tech-savvy, entrepreneurial 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?
- Where is the wealth now coming from and how can you meet those clients' needs?
- How to achieve competitive advantage through scaling operations and refocusing on the key markets?

Our conference agenda leverages the expertise across Timetric's research and publishing portfolio, including Private Banker International, Wealth Insight and Spears. Developed to explore the vision of a smarter, safer, more efficient future of the private banking industry from a new perspective.

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.

Who is attending?

The annual event brings together decision-makers and specialists from a variety of key sectors:

- Private banks and financial institutions
- Wealth managers
- Boutique private banks
- Online banking providers
- Offshore and onshore institutions
- Technology providers
- Researchers and Analysts

Private Banking: London 2015 provides a setting to engage in a dialogue with the community of decision-makers and influencers.

We invite you to become an active voice in this discussion to shape the future of private banking.

08:30-09:00 **Coffee & Registration - Exhibition Area**

09:00-09:10 **Chairperson's Welcome**
Meghna Mukerjee, Editor, **Private Banker International**

Session One

Scene Setting: The UK Private Banking Landscape In 2015

09:10-09:30 **Opening Keynote: Private Banking Industry Review**

- Exploring the current state of the private banking industry in the UK
- Key industry trends and opportunities
- Challenges and pitfalls faced in 2015

Tracey Reddings

Head of UK Private Wealth Management
J.P. Morgan Private Bank

J.P.Morgan

09:30-09:50 **Adding Value to Investment Advice by using Digital and Compliance**

- Investment advice is moving from product push to client orientation
- Regulatory compliance is not a burden but an opportunity
- Digital developments can make advisor-client interaction more effective

Ton Kentgens

Global Business Development, Private Wealth Management
Ortec Finance



09:50-10:30 **Panel Discussion: Wealth Management Trends In The UK**

Hear industry experts discuss the latest industry developments and share their thoughts on key issues, including:

- Creating a customer focused and competitive market
- Comparing the UK with Switzerland and other private banking hubs
- Outlining the challenges ahead and guidelines to prepare for them
- Latest practices in serving HNW and UHNW customers
- The importance of your brand in securing new customers
- Consolidating in accordance with regulatory change

Speakers:

- **Annamaria Koerling**, Head of Wealth Management, **C. Hoare & Co.**
- **Christian Berchem**, Managing Director, **Barclays Wealth and Investment Management**
- **Eric Barnett**, CEO, **Societe Generale Private Banking Hambros**
- **Ton Kentgens**, Global Business Development, Private Wealth Management, **Ortec Finance**

C. Hoare & Co.
PRIVATE BANKERS SINCE 1872



BARCLAYS

SOCIETE GENERALE
Private Banking



10:30-11:00 **Coffee Break – Exhibition Area**

Session Two

Where Is The Wealth? European Investment Trends In 2015

Chairperson: Oliver Williams, Head, **Wealth Insight**

11:00-11:20

Future Developments in Private Banking

- Changing demographics
- Where is Private Banking now and where does it need to be tomorrow?
- How can you shape the journey?

Charles Hoffman
Managing Director
HSBC Private Bank (UK)



11:20-11:40

The Art of Business / The Business of Art

- How Christie's connects people to art – globally and digitally
- As collecting tastes evolve, so do we...a brief outline of how we do business, where we do business and how we continue to inspire people to buy art
- What next for the aspiring collector? We have a deep understanding of 'market' and can provide an individual service to guide and advise

Paul Hewitt
Managing Director Growth Markets
Christie's



11:40-12:00

A Hybrid Investment Journey: Opportunity or Threat?

Peter Schramme
Chief Business Development Officer
Objectway Group, Brussels



12:00-12:20

The Future of Wealth Management

- The opportunity of sustainable growth in a changing environment
- The challenge of cross-generation client perspectives
- The urgency of omni-channel client offerings

Hein van der Loo
Head of Strategy and Business Development
ABN AMRO Private Banking



12:20-12:45

Panel Session and Q&A

Speakers:

- **Paul Aitken**, Founder and CEO, **Borro**
- **Hein van der Loo**, Head of Strategy and Business Development, **ABN AMRO Private Banking**
- **Peter Schramme**, Chief Business Development Officer, **Objectway Group**, Brussels
- **Paul Hewitt**, Managing Director Growth Markets, **Christie's**



12:45-14:00

Networking Lunch

Sponsored by:



Session Three

Future Focus: Digital Disruption in the Private Banking Industry

Chairperson: Douglas Blakey, Group Editor Consumer Finance Titles, **Timetric**

14:00-14:20

Mobile Banking And Wealth Management: Digital Portfolios

- Giving your clients a choice of ways to interact with the bank
- Developing an app with your existing clients in mind: the consumer-led online revolution
- Providing specific content for HNW clients
- Building trust in clients to adopt online practices

Tim Tate

Director, Client Experience and Innovation

Citi Private Bank



14:20-14:40

The Imperative of Change

- Is today's web banking enough?
- Will today's financial market architecture come to an end?
- How can banks adapt to the change to succeed

Francisco Fernandez

Group CEO

Avaloq



14:40-14:50

The Power of User Experience in New Generation Wealth Management

- User Experience - Myth or reality?
- Do your advisors love their current IT software?
- Advisory and client platforms: Only functionality counts? What about User Experience?
- How to use technology as business accelerator?

Imre Rokob

Business Development Director

Dorsum



14:50-15:30

Panel Session: Digital Disruption in the Private Banking Industry

- Exploring digital developments in the past year
- How can embracing digital positively impact your business?
- Creating opportunities for firms to make a big impact in the industry through digital
- Can private banking ever become truly digital?

Speakers:

- **René Hürlimann**, Director, EMEA & APAC, **Appway**
- **Graham Aikin**, CEO, **HNW Social Media Solutions**
- **Simon Cadbury**, Head of Strategy & Innovation, **Intelligent Environments**
- **Francisco Fernandez**, Group CEO, **Avaloq**
- **Tim Tate**, Director, Client Experience and Innovation, **Citi Private Bank**



15:30-16:00

Coffee Break and Networking – Exhibition Area

Session Four

Building A Roadmap For 2015 And Beyond

Chairperson: Meghna Mukerjee, Editor, **Private Banker International**

16:00-16:20

Philanthropy In Private Banking

- What philanthropy means in 2015
- Philanthropy from the clients' perspective
- The opportunity philanthropy presents in Private Banking

Russell Prior

Head of Philanthropy

HSBC Private Bank (UK)



16:20-16:40

Philanthropy and Family Wealth: Building A Stronger Legacy For The Future

Maya Prabhu

Managing Director

Coutts Institute



16:40-17:30

Panel Discussion: The Future Of The UK As A Global Private Banking And Wealth Management Capital - Building A Roadmap For 2015 And Beyond

- Is the UK's position as a global wealth management centre changing? Looking at London as a wealth hub
- Implications for the rest of Europe
- Key industry developments: Philanthropy, UHNWs, Digital
- Lessons learned and key takeaways from today's presentations
- Building a roadmap for 2015 and beyond

Speakers:

- **Akshaya Bhargava**, CEO, **Barclays Wealth and Investment Management**
- **James Fleming**, CEO, **Arbuthnot Latham**
- **Maya Prabhu**, Managing Director, **Coutts Institute**



17:30

Chairperson's Closing Remarks

17:30

Drinks Reception

20:00

Conference Dinner & Awards Ceremony