Private Banking: London 2016

Exploring the Disruption of Wealth Management

08:00-09:00	Welcome Refreshments & Registration
09:00-09:10	Welcome from Private Banker International *Meghna Mukerjee, Editor, Private Banker International*

SESSION ONE
The Evolving Private Banking Landscape

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

- Exploring the current state of the private banking industry
- The unavoidable rise of digital within wealth management
- Key challenges and pitfalls over the last 12 months
- Where does the UK stand compared to Europe?

Jean-François Mazaud, Head of Societe Generale Private Banking

09:30-09:50 **Bridging Technology and Business**

- Increasing client expectations on digitisation
- Technology driving the evolution of the banking and wealth management business
- Harnessing disruption to succeed in a sharing economy

Francisco Fernandez, Group CEO, Avaloq

09:50-10:10 **The Importance of Rebuilding Confidence and Trust in the Financial Services Sector in Support of Economic Growth**

- Increasing honesty and transparency, together with more personalisation, but is the tide of trust beginning to turn?
- Identifying legacy issues and a rising tide of regulation are distracting the industry
- What does client centric really mean?

Annamaria Koerling, Head of Wealth Management, C. Hoare & Co.

10:10-10:30 **Unlocking the Potential of the Y and Z Generation in Wealth Management**

- Are robo advisors a real threat for new generation customers or a trendy gizmo?
- Why hybrid advisory can be the answer?
- Ways to become a digital hybrid advisor and to service future client base?

Imre Rokob, Business Development Director, Dorsum

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

10:50-11:20 **Networking Coffee Break – Exhibition Area**

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SESSION TWO
New Horizons for Investment and Philanthropy

Chairperson: *George King, Partner, MASECO Private Wealth*

11:20-11:40 **What is Happening to the World of Investing?**
- Exploring investment trends in 2016 and beyond
- Changing world, changing regulation, changing customers
- The impact on investing and investment trends

Oliver Gregson, Head of Investment Services & Product Solutions UK & CI, HSBC Private Bank (UK)

11:40-12:00 **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

12:00-12:20 **Blurring the Lines of Philanthropy and Investment**
- The growing demand for philanthropy from younger generations
- Defining the difference between philanthropy and impact investments

Russell Prior, Head of Philanthropy, HSBC Private Bank (UK)

12:20-12:40 **Philanthropy for Private Clients**
- Trends in philanthropy
- Philanthropy from a client's perspective
- Scale of the opportunity for Private Banks

Emma Turner, Head of Client Philanthropy, Wealth and Investment Management, Barclays

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

Speaker joining: Oliver Williams, Head of Wealth Insight

13:00-14:00 **Networking Lunch – Exhibition Area**

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SESSION THREE
Enhancing Client and Advisor Relationships

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

14:00-14:20 **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, Managing Director, Hearsay Social Europe

14:20-14:40 **The Need to Service an Increasingly Mobile and International Client Base**

- The rationale behind the rebranding
- Global reorganisation of Credit Agricole Private Banking earlier this year

Frederic Lamotte, Global Head of Investing Wealth, Indosuez Wealth Management

14:40-15:00 **Digital Transformation: Impact on Client and Advisor Relationships**

- Client onboarding boosts efficiency, assures legal and tax compliance
- Huge benefits of automation – guaranteed client satisfaction
- Reviewing recent studies into client onboarding

René Hürlimann, Head of Sales EMEA, Appway

15:00-15:30 **Expert Panel Session: Digital Disruption in the Private Banking Industry**

Experts from private banks, fintech firms and consultants will discuss and debate how digital is disrupting the industry like never before

- Exploring digital developments in the past year
- The rise of automation and robo-advisers
- Risks of security, cyber crime and your reputation
- Investing in innovation labs
- Using digital to increase client engagement
- Can private banking ever become truly digital?

Speakers include:

- *René Hürlimann, Head of Sales EMEA , Appway*
- *Huy Nguyen Trieu, Author, Disruptive Finance*
- *Chris Andrew, Managing Director, Hearsay Social Europe*
- *Frederic Lamotte, Global Head of Investing Wealth, Indosuez Wealth Management*
- *Simon Cadbury, Director of Strategy and Innovation, Intelligent Environments*

15:30-16:00 **Networking Break – Exhibition Area**

SESSION FOUR
Future Perspectives – Building A Roadmap Beyond 2016

Chairperson: *Ian Woodhouse, Director, Private Banking and Wealth Management, PwC*

16:00-16:20 **The Future of Asset Allocation within Private Banking**

- Strategic and tactical
- Active and passive
- In-house and out-source
- Absolute or relative returns
- The importance of opportunity sets

Arne Hassel, CIO, Barclays Wealth and Investment Management

16:20-16:40 **Future Developments in Private Wealth**

- Changing demographics
- Impacts of regulation, technology and the evolving customer
- How can you shape the journey?

Alexandra Altinger, Chief Executive Officer, Sandaire

16:40-17:20 **Expert Panel: Where is Private Banking Now and Where Does it Need to be Tomorrow?**

Private Banking experts from European private banking hubs will discuss and debate the future of the industry

Discussion points include:

- Assessing key developments internationally
- How can the UK learn from other markets
- Reviewing regulation and transparency in today's world
- Does digital transcend borders?
- Lessons learned and key takeaways from today's presentations
- Building a roadmap for 2016 and beyond

Speakers include:

- *James Fleming, Vice Chairman, Arbuthnot Latham & Co.*
- *Arne Hassel, CIO, Barclays Wealth and Investment Management*
- *Alexandra Altinger, Chief Executive Officer, Sandaire*
- *John Maitland, Head of UK Private Banking , Societe Generale Private Banking Hambros*

17:20 **Closing remarks -** *Meghna Mukerjee, Editor, Private Banker International*

19:00 **Private Banker Awards 2016**