

Establishing London as a Key Wealth Hub

08:00-09:00 **Welcome Refreshments & Registration**

09:00-09:10 Chairpersons welcome:



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



SESSION ONE

The Evolving Private Banking Landscape and London's Status in 2017

09:10-09:30 **The Wealth Management Industry: Evaluating the Current Landscape**

- Global trends and technological shifts that will shape the industry
- What separates London's private banking industry from other international wealth hubs?
- Consolidation in our industry
- Key changes and challenges Brexit will bring to London in 2017



Paul Kearney, Managing Director, **Kleinwort Hambros**



SOCIETE GENERALE GROUP

09:30-09:50 **Shaping the Digitalisation of the Global Finance Industry**

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



Francisco Fernandez, Founder & CEO, **Avaloq**



09:50-10:10 **Tailoring Our Banking Model: Adapting to Changing Need of Clients**

- The importance of innovation in private banking
- Allowing clients to view their money when and where they want
- Engaging the client with new technologies
- Changing buying behaviours and demands of clients



Dena Brumpton, CEO, Wealth & Investments, **Barclays**



10:10-10:30 **Tailored Offerings for the Next Generation**

- Key facts and insights into the next generation
- What are the major needs of the next generation and how can a bank address them?
- The power of networks to drive our net worth



Claudio de Sanctis, Head of Private Banking Europe, **Credit Suisse**



10:30-11:00 **Speaker Discussion and Q&A**

Speakers include:

Paul Kearney, Managing Director, **Kleinwort Hambros**

Francisco Fernandez, Founder & CEO, **Avaloq**

Dena Brumpton, CEO, Wealth & Investments, **Barclays**

Claudio de Sanctis, Head of Private Banking Europe, **Credit Suisse**



SOCIETE GENERALE GROUP



11:00-11:20 **Networking Coffee Break – Exhibition Area**

SESSION TWO

Servicing Today's Client: Identifying Their Needs and Preferences



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

[WEALTHINSIGHT](#)

11:20-11:40

Helping Clients Make the Most of Pension Freedom

- How pension freedom has changed client behaviour
- Different ways of thinking about drawdown
- Using technology to support goal-based financial planning



Richard Parkin, Head of Pensions Policy, **Fidelity International**



11:40-12:00

Digitising Operations: Be Ready for the Customers of Tomorrow

- How to efficiently leverage your legacy systems and leverage them in an omni-channel way
- Orchestrate your landscape today, for the customers of tomorrow
- Use Work Automation to optimise operations and increase value for employees and customers alike
- Face challenges and mitigate risks of digitalisation



René Hürlimann, Head of Sales, EMEA, **Appway**



Thomas Schär, Digital Innovations Lead, **Appway**



12:00-12:20

Maintaining Strong Client Relationships – African Perspective

- Determining which structure works best for the client and providing tailored solutions
- Keeping up with the customer and their evolving needs
- Creating and maintaining long term relationships



Hugo Borges, Regional Market Head Africa & Europe, Private Bank, **Standard Chartered Bank**



12:20-12:50

Speaker Discussion and Q&A

Speakers include:

René Hürlimann, Head of Sales, EMEA, **Appway**

Richard Parkin, Head of Pensions Policy, **Fidelity International**

Edward Thomas, New Business Manager, **Oxfam**

Hugo Borges, Regional Market Head Africa & Europe, Private Bank, **Standard Chartered Bank**



12:50-13:50

Networking Lunch – Exhibition Area

SESSION THREE

Broadening out From the Traditional Private Banking Premise



Chairperson: Bartosz Golba, Head of Wealth Management, **GlobalData**



13:50-14:10

Changing Customer Expectations and How to Meet Them

- Technology trends and how they affect consumer behaviour
- Personalisation and experience are the differentiator
- Innovating with direction



Simon Kingsnorth, Global Head of Digital Marketing, **Citi Private Bank**



14:10-14:30

The Importance of the Customer Journey and Innovation in Banking Customer Acquisition

- Why we need to talk about the customer journey and the mobile first approach
- Rise of the bots or the deployment of artificial intelligence to customer acquisition
- Botboarding – get your own bot within weeks and start acquiring new customers
- Virtual advice – retain your customers with the help of a mobile app



Sándor Szabó, Key Account Manager, **Dorsum**



14:30-14:50

How Private Banking can be the Disruptive Force

- How far have we come - the Uber moment of banking
- How do we bring private banking to the mass-affluent?
- Future elements critical to product development in fintech



Ali Sadr, Chairman, **Pilatus Bank**



14:50-15:10

Exploring how Robo-Advisors Present Opportunity to Traditional Wealth Management

- Start with the client: the need to adapt our approach to suit new and different needs of existing and future clients
- The growth of online and digital services – a fundamental part of life
- Addressing the wider knowledge gap
- Opportunities for traditional wealth managers



Nick Middleton, Co-Head, **UBS SmartWealth**



15:10-15:30

Speaker Discussion and Q&A

Speakers include:

Simon Kingsnorth, Global Head of Digital Marketing, **Citi Private Bank**

Sándor Szabó, Key Account Manager, **Dorsum**

Andrew Reid Thomas, Head of Sales, Europe, **InvestCloud**

Ali Sadr, Chairman, **Pilatus Bank**

Nick Middleton, Co-Head, **UBS SmartWealth**



15:30-15:50

Networking Coffee Break – Exhibition Area

SESSION FOUR

A Birds Eye View: Private Banking in UK and Europe- What Should We Expect?



Chairperson: Ian Woodhouse, Senior Business Advisor, **Orbium**



15:50-16:10

Future Developments in Private Wealth

- Identifying the challenges
- Formulating the response
- Thinking beyond the retail client



John Saunders, Managing Director of US and Europe, **Coutts International**



16:10-16:50

Live Expert Debate: London's Post Brexit Position

Private Banking experts will discuss and debate for or against Brexit, and the future of private banking in London and beyond, in its post Brexit status

Discussion points include:

- How will private banking in UK and Europe be affected by Brexit?
- Assessing key developments internationally
- How can the UK learn from other markets?
- What impact will Brexit have on regulation?
- How can we shape the future journey of 2017 and beyond?
- Lessons learned and key takeaways from today's presentations



Speakers include:

James Fleming, Vice Chairman, **Arbuthnot Latham & Co.**



Jonathan Davis, UK Managing Director, **Avaloq**



John Saunders, Managing Director of US and Europe, **Coutts International**



Mouhammed Choukeir, Chief Investment Officer, **Kleinwort Hambros**

Alexandra Altinger, CEO, **Sandaire Investment Office**



16:50-17:00

Closing remarks: Meghna Mukerjee, Editor, **Private Banker International**

17:00

Close of Conference

18:00

Pre-Awards Drinks Reception – Palm Court

19:00

Private Banker International Awards Dinner 2017 – Adelphi Suite