

PRIVATE BANKING AND WEALTH MANAGEMENT GERMANY

TUESDAY 30th APRIL 2019 | FRANKFURT

Awarding leading Global Private Banks and Wealth Management Companies in Germany

2019 SPEAKING FACULTY

CHAIRMAN: Oliver Williams, Editor, Private Banker International

Thomas Rueschen, CEO, Deutsche Oppenheim Family Office AG

Marc Engelbrecht, Digital Transformation, AI Initiative Lead, Allianz Global
Investors

Gary Barnett, Chief Analyst, Technology Thematic Research, GlobalData

Michael Kohl, Managing Director, Commerzbank AG

Christian Mangartz, Head of Private Banking – West Region, HypoVereinsbank -
Member of UniCredit

Reinhard Pfingsten, Chief Investment Officer (CIO), Bethmann Bank - ABN AMRO
Group

Ralf Mielke, Head Sustainable Investments, Julius Bär Deutschland

Rainer Schuett, Assistant Vice President/ Senior Expert Private Banking, Deutsche
Bank AG

Dr. Martin Deckert, Chief Operating Officer, Merck Finck & Co

Gerit Heinz, Global Chief Investment Strategist, Deutsche Bank Wealth
Management

Christof Roßbroich, Head of Sales Germany, Avaloq

Ton Kentgens, Global Business Development, Private Client Solutions, ORTEC
Finance

Luc Haldimann, CEO, Unblu

Mohamed Louizi, Head of Private Banking Technologies, Project Management,
swissQuant Group

Christian Klausen, Head of PBT Consulting, swissQuant Group

Frank Wagner, CEO & Founder, INVAO Group

Leena Iyar, Head of Marketing, Moxtra

For programme enquiries please contact:

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Private Banking and Wealth Management Germany Conference and Awards 2019 Conference Day	
08:00 – 09:00	Registration and refreshments
09:00 – 09:10	CHAIR'S OPENING REMARKS: Oliver Williams, Editor, Private Banker International
SESSION ONE: What is the current state of Private Banking and Wealth Management in Germany?	
09:10 – 09:30	Beyond the peaks: Capital Market Outlook - How to invest after the peaks of growth in GDP, in company earnings and in central bank liquidity? Gerit Heinz , Global Chief Investment Strategist, Deutsche Bank Wealth Manager 
09:30 – 09:50	Intelligent private banking is digital - Serve your client better with digital asset management - The power of data and platforms - Creating trust digitally Christof Roßbroich , Head of Sales Germany, Avaloq 
09:50 – 10:10	Clarifying the 2019 state of Private banking in Germany and Austria to strategically plan and manage risk for the future - Pinpointing the potential risks within the market and building strategies to overcome pitfalls - Understanding market trends and finding practical solutions to manage risk efficiently - Illustrating how far the industry has embraced technology to tap into new, sustainable markets - Discussing the benefits of transparency in digital platforms compared to human interactions to evaluate a better business strategy Michael Kohl , Managing Director, Commerzbank AG 
10:10 - 10:30	The Digital Front Office Solution: Client Engagement for the On-Demand Era - Today's wealth management customers expect powerful, on-demand digital experiences from their financial services providers. Private banks are seeking to adapt their businesses to this digital imperative. - Learn how banks like Citibank and Standard Chartered have leveraged Moxtra's next-gen collaboration platform to digitally transform: reducing friction, accelerating transactions, and providing white glove service to their clients. Leena Iyar , Head of Marketing, Moxtra 
10:30 – 10:50	MODERATED SPEAKER DISCUSSION AND Q&A SESSION Moderated by Oliver Williams , Editor, Private Banker International

	Michael Kohl, Managing Director, Commerzbank AG Gerit Heinz, Global Chief Investment Strategist, Deutsche Bank Wealth Management Christof Roßbroich, Head of Sales Germany, Avaloq Senior representative, Moxtra
10:50 – 11:20	Morning refreshments and networking
SESSION TWO: What forms of technology enhances client experience?	
11:20 – 11:40	Global trends in HNWI wealth management - Is investment performance equal to client satisfaction? - How is Hybrid changing the way we advise clients? - Are Bigtechs a threat for the industry? - And what about eco-systems...? Ton Kentgens, Global Business Development, Private Client Solutions, ORTEC Finance 
11:40 – 12:00	Applying Artificial Intelligence for efficient client advice, improved investment and efficient processes - An asset manager's perspective on leveraging advanced analytics and AI along the whole value chain with examples - o Within distribution to personalize client advice and to support the sales team - o To improve the investment process in terms of insights and investment decisions - o To manage risks and optimize back-office processes - Personal anecdotes on AI investments – thematic vs. automated vs. augmented human capabilities - Organizationally and technically enabling AI and analytics by leveraging a collaborative cloud-based AI/big data platform and hackathons events Marc Engelbrecht, Digital Transformation, AI Initiative Lead, Allianz Global Investors 
12:00 – 12:20	Automatization and scaling effects in wealth management - How digitalization requires automatization and enables scaling effects - Means to automatize wealth management - Future models for wealth management in an automatized world - Results from customer projects Mohamed Louizi, Head of Private Banking Technologies, Project Management, swissQuant Group Christian Klausen, Head of PBT Consulting, swissQuant Group 
12:20 – 12:40	MODERATED SPEAKER DISCUSSION AND Q&A SESSION Moderated by Oliver Williams, Editor, Private Banker International Marc Engelbrecht, Digital Transformation, AI Initiative Lead, Allianz Global Investors

	Mohamed Louizi , Head of Private Banking Technologies, Project Management, SwissQuant Christian Klausen , Head of PBT Consulting, swissQuant Group Ton Kentgens , Global Business Development, Private Client Solutions, ORTEC Finance
12:40 – 13:40	Lunch
SESSION THREE: Alternative investment strategies and asset classes	
13:40 – 14:00	Investing in Blockchain as an Asset Class - opportunities and risk control - What is the Blockchain technology really about? - Portfolio Diversification with Blockchain Assets / Tokenized Assets - Which aspects are relevant for an investment into this asset class? - The next generation in private banking and wealth management - digital investment portfolios Frank Wagner , CEO & Founder, INVAO Group 
14:00 – 14:20	PANEL DISCUSSION: Deconstructing ESGs (Environmental, Social, Governance) as proof to delivering superior results in Asset and Wealth Management - Understanding the risk of sustainable investments and whether it would be of asset value for clients interested in ethical results of investment - Clarifying the profitable areas of sustainable investment to understand areas - Integrating financial sustainability for ethical and long term investment with clients - What do we understand by philanthropic investing? - How to successfully integrate ethical and/or sustainability aspects into long term investments with clients? Reinhard Pfingsten , Chief Investment Officer (CIO), Bethmann Bank - ABN AMRO Group  Ralf Mielke , Head Sustainable Investments, Julius Bär Deutschland 
14:20 – 14:40	Conversational Banking: A strategic imperative for Wealth Management and Private Banking Private Banks and Wealth Managers are challenged to create new ways to drive the customer relationship in the digital age. Conversational Banking in digital channels is a paradigm shift that will allow Banks to create a new level of customer intimacy that creates and executes ideas to trade. Luc Haldimann , CEO, Unblu 
14:40 – 15:00	MODERATED SPEAKER DISCUSSION AND Q&A SESSION Moderated by Oliver Williams , Editor, Private Banker International Reinhard Pfingsten, Chief Investment Officer (CIO), Bethmann Bank - ABN AMRO Group Ralf Mielke, Head Sustainable Investments, Julius Bär Deutschland Luc Haldimann, CEO, Unblu Roger Stettler, Member of the Executive Board, additiv AG Frank Wagner, CEO & Founder, INVAO Group

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15:00 – 15:30 Mid-Afternoon Refreshments	
SESSION FOUR: What is the Future of Private Banking?	
15:30 – 15:50	Q&A: Clarifying the future digital needs of UHNWIs and HNWI's in Private Banks and Family Offices to successfully acquire the Next Generation in Private Banking - Illustrating how Private Banks and Family Offices adapt to the needs of the younger Generation - Revitalising the traditional role of banks to stay ahead of competitors - Understanding what digital strategies needs to be implemented to increase accessibility for clients - Pinpointing the different behaviours of age groups in relation to private banking and assessing what immediate changes needs to be automated DEUTSCHE OPPENHEIM Family Office Thomas Rueschen, CEO, Deutsche Oppenheim Family Office AG
15:50 – 16:10	Keeping up with the changing behaviours and expectations of the Next Generation of Private Bankers: Strengthening your relationship to create a personalised service with the private clients of today - Generating new and innovative methods of meeting and acquiring clients born within the Millennial and Sandwich Generation - Creating a flexible client experience through digital means - Using phone, emails and social media such as WhatsApp to consistently connect with clients on the go - Staying ahead of the digital advances of the industry to successfully integrate new clients  Member of UniCredit Christian Mangartz, Head of Private Banking – West Region, HypoVereinsbank - Member of UniCredit
16:10 – 16:30	Closing Debate: Creating an effective hybrid model between digitalisation and relationship managers to effectively help millennials in banking - Optimising multi-channel services to build a hybrid model for effective and enhanced client service - Creating an efficient model of hybridisation which effectively has a good digital and online interface and offer real time solutions to clients - Effectively upgrading traditional offices to carry out automated processes and provide better 'basic' services (i.e. emails and phone) for enhanced contact with clients - Maximising face to face relationships between banks and clients to understand which particular areas could be driven by digital means effectively Rainer Schuett, Assistant Vice President/ Senior Expert Private Banking, Deutsche Bank AG  Dr. Martin Deckert, Chief Operating Officer, Merck Finck & Co  Christof Roßbroich, Head of Sales Germany, Avaloq 

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16:30 – 16:40	CHAIR'S SUMMARY AND CLOSE OF CONFERENCE: Oliver Williams, Editor, Private Banker International
16:40	Close of Conference
17:00 – 19:00	Private Banker International Awards, Reception and Canapes