11 December 2019, Zurich

08.00 **Registration**

09.00 **Welcome address and chair's opening remarks**
Patrick Brusnahan**, Editor, **Private Banker International

SESSION ONE | Navigating the evolving private banking landscape

09.10 **Keynote address | The future of Wealth Management and what we can learn from pop corn**

Every revolution happened because there was a human need and not because of technological possibilities: understanding the human operating system is crucial for understanding the new business strategies and innovations in a more and more digitized world. Why were some changes in the past more successful than others? And what does this mean for the global wealth management industry in the upcoming years?
Martin Meyer**, Head of Innovation Global Wealth Management, **UBS

09.30 **The Next-Generation Wealth Manager**

- What will success look like for the Wealth Manager of the future?
- How High-Net-Worth Investors' attitudes and goals are defining the industry's future in Europe and across the World?
- Temenos Wealth Director, Pierre Bouquieaux, will be presenting exclusive findings from the latest Temenos in association with Forbes research report with insights into the importance of customer experience, AI and Analytics as well as the impact and importance of the Mass affluent market.

Pierre Bouquieaux**, Product Director, Wealth, **Temenos

09.50 **UHNWI : a sought after and also challenging segment to address for private banks**

- A fast growing market with fierce competition
- Designing a financial offering that requires innovation, differentiation and performance
- Beyond financial services: what do UHNWI clients expect from their private banks?

Emile Salawi**, Head of Family Offices & Institutional Coverage, **BNP Paribas Wealth Management**, **BNP Paribas

10.10 **Can regulation be an opportunity for client centric advisory? Lessons learned next door**

- Serve the investor: protection as a key part of the advisory value offer
- Follow the client: advisory and protection beyond the house view
- Enable the banker: methodologies, technologies and data to make it work

Martin Skup**, Wealth Management Digitalization Specialist, **Prometeia

10.30 **Leaders' forum and Q&A | A strategic overview: the future of private banking and wealth management**

- A spotlight on the strategic trends in Switzerland: consolidation, partnerships, and more
- The best of both worlds: optimising private banking services in a digitalised age
- Attracting new talent and investing in the skills to drive competitive advantage
- Innovation… more than just a buzzword: getting cultural buy-in from all stakeholders to efficiently create new products, services and models
- Upcoming political uncertainty and instability: how can banks best prepare?

Clemens Pieger, *Head of Zurich Branch*, ***Societe Generale***
Nicolas Bonvin, *Head of Applied Innovation*, ***Banque Pictet & Cie***
Emile Salawi, *Head of Family Offices and Institutional Coverage*, ***BNP Paribas Wealth Management***
Noah Kraehenmann, *Regional Director CEE*, ***Temenos***
Martin Skup, *Wealth Management Digitalization Specialist*, ***Prometeia***
Martin Meyer, *Head of Innovation Global Wealth Management*, ***UBS***

11.15 **Refreshment break**

SESSION TWO

Stream A | Digital, convenient, personal: customer-centric digital strategies

Chaired by ***Patrick Brusnahan***, *Editor*, ***Private Banker International***

11.45 **Powering One-Stop Digital Business Apps in The Mobile Era**

- How to make your mobile app the one-stop destination for engaging with high touch clients and completing business transactions, on-demand
- See how the world's leading financial institutions like Citibank, leverage Moxtra's solution to power their app, to secure the growth and direct loyalty of their clients.

Raghavendra Ramesh, *Relationship Manager*, ***Moxtra***

12.05 **Digital Onboarding: Pleasant customer experience in Wealth Management**

- A radical swift in customers' expectations: Wealth managers need to adapt to demands for immediacy & agility
- Making the process of opening an account seamless and comfortable is not impossible
- Unleashing the potential of digital ecosystems as a catalyst for delivering sustainable growth

Javier Rubio, *Head of Business Development*, ***BBVA***

Stream B | Let's talk about investments: 2020 and beyond

Chaired by ***Ian Woodhouse***, *Head of Strategy and Change*, ***Orbium***

11.45 **Investing 4.0: how to master complexity in meeting your technological requirements during this digital era**

- Exploring the 'building blocks' theory in portfolio management and the technological abilities to make this a reality
- Digging into the 3-layer approach to technological change
- Secure, smart, agile: exploring the requirements of each level in the context of technological transformation

Mario Alves, *Head of Sales and Partnerships*, ***Aixigo***

12.05 **Innovation focus | Digital Assets – Invest into the future**

- What is distributed ledgertechnology (DLT)
- What can it be used for?
- Cryptocurrencies – the uncorrelated asset class
- Tokenization - how to unveil the full potential of DLT

Martin Burgherr, *Chief Client Officer*, ***Sygnum***

12.25 **Why does customer centric design keep failing?**

- Where is the customer in new banking models?
- Is there a distribution model issue in banking?
- What are the implications for wealth strategies going forward?

Olivier Grandjean*, Associate Partner,* ***Orbium***

12.45 **Panel discussion | Making the leap to digital: getting it right**

- Looking into the exciting benefits of agile systems: what are the value-added gains for banks and customers?
- From UHNW to mass affluent customers: assessing your unique customer base and their digital needs
- Communicating with offshore clients: exploring the power of digital to enhance customer experiences and secure client-bank communications
- Boutique versus incumbent players: to what extent does cost take priority when making decisions?
- Keeping private banking values at the heart of digital transformation: making relationships the star of the show
- Focusing on the risks that come with digital advancements: a double-edged sword for security?

Raghavendra Ramesh*, Relationship Manager,* ***Moxtra***
Simon Kauth*, Chief Product Officer,* ***Finnova***
Javier Rubio*, Head of Business Development,* ***BBVA***
Christine Ciriani*, Chief Commerc al Officer,* ***Finantix***
Olivier Grandjean*, Associate Partner,* ***Orbium***

12.25 **It is becoming irresponsible to have no Exposure to Crypto & Blockchain?**

- What are the raising signals of a financial crisis with global impact?
- Could crypto and Blockchain play a strategic role in the structure of an investment portfolio?
- Is investing in crypto with active risk management the right approach for this asset class?

Frank Wagner*, CEO & Co-Founder,* ***INVAO Group***

12.45 **Discussion and Q&A | Exploring the investment landscape of today and tomorrow**

- Improving returns for clients: how and where should client assets be invested?
- Emerging markets, alternatives and beyond: diversifying portfolios and increasing returns
- The B word: how can private banks and wealth manager's best prepare for the impacts of Brexit on markets?
- Blockchain and cryptocurrencies: exploring the opportunities and challenges for investors
- Embracing new technologies to enhance future investments: strategies for success

Théodore Economou*, Chief Investment Officer,* ***Lombard Odier***
Nicolas Bickel, *Head of Exclusive Advisory,* ***Edmond De Rothschild***
Frank Wagner*, CEO & Co-Founder,* ***INVAO Group***
Andreas Meier*, Chief Investment Officer Europe,* ***Lombard International Assurance***
Martin Burgherr, *Chief Client Officer,* ***Sygnum***
Mario Alves*, Head of Sales and Partnerships,* ***Aixigo***

13.35 **Lunch**

SESSION THREE

Stream A |Driving CX Excellence and Value		Stream B |Successfully serving the evolving client base: meeting and exceeding expectations	
*Chaired by **Patrick Brusnahan**, Editor, **Private Banker International***		*Chaired by **Ian Woodhouse**, Head of Strategy and Change, **Orbium***	
14.35	**A sea of opportunity: capitalising on the exciting potential of Open Banking** • Seeing beyond payment related use cases: digging into the strategic advantages of Open Banking • What are the applications of Open Banking and open APIs for private banks and wealth managers? • Connected digital platforms: strengthening relationships and offering new services • Creating competitive advantages: keeping relationships at the heart of digital developments to attract and retain clients ***Simon Alioth**, Associate Partner, **Synpulse***	14.35	**Fees down, costs up? How to create value for sustained profitability** ***Exploring what today's investors expect according to Appway's freshly released 2019 Wealth Management study, conducted by Scorpio Partnership*** • Customer loyalty in a perfect storm: What makes investors consider switching providers • 'Be more like Amazon': Investors' vision of tech-inspired value creation • The evolving role of the wealth advisor: Finding the right dosage of online and offline interactions • How Appway helps wealth managers respond to these challenges. ***Chiara Gelmini**, Business Practice Manager, **Appway***
14.55	**Customer Experience: Myth and Paradigm** • Are the Core principles for excellence in Customer Experience related with technology? • From the old style to the technological boost enablement on companies relationship with the Customer ***José Uribarri Soares**, Head of IT and Business Development, **Millennium Banque Privee***	14.55	**Opening an account at a private bank is as easy as subscribing to Netflix** • Digitalization of the Identification and Onboarding process of a Private Bank • User Experience of Private Banking clients in 2020 ***Christine Wunderli**, Business Engineer Digital Wealth Management, **Vontobel***
15.15	**Conversational Banking time is now** • How Conversational Platforms are being used by wealth managers in order to make seamless investing a reality, allowing a client and their relationship managers to research, communicate and make decisions together.	15.15	**Top 5 Myths about Client Lifecycle Management (CLM)** Client Lifecycle Management (CLM) is an increasingly popular term in our industry, promising cost reduction, increases in client satisfaction and AuM growth. How can you avoid these five common misconceptions to ensure CLM adds value

- Adapt your customer journey now. Virtually put a relationship manager into your customers' pocket and create genuine personal relationships. Just as our customers like Bank Millennium, UBS, Deutsche Bank and many more have already done.

Luc Haldimann**, Chief Executive Officer,* ***Unblu

15.35 **Panel discussion | Bringing together technology, business strategy and skillsets: the road to fruitful innovation**

- Exploring the reality of squeezed profit margins: how is this impacting banks in Switzerland?
- Innovative leaders today: which companies have successfully created and implemented cost-efficient strategies?
- How might partnerships bring in new technological capabilities and innovative mind-sets to help evolve legacy business models?
- Preparing the workforce to remain competitive: what must be done to achieve this in the digital era?
- Adding more value to customers: what value-add services can be developed and how can these be monetised?
- Fail and fail fast: encouraging cost-efficient experimentation within the business

José Uribarri Soares**, Head of IT and Business Development,* ***Millennium Banque Privee
Luc Haldimann**, Chief Executive Officer,* ***Unblu
Simon Alioth**, Associate Partner,* ***Synpulse

to your business and your clients?
Dominic Snell**, Director of Consulting,* ***Wealth Dynamix

15.35 **Debate | Keeping next-gen clients on-side in an increasingly competitive landscape**

- How are the demands of next-gen clients different to today's mass client base?
- Digital natives versus digital immigrants: understanding the communication preferences that vary between different demographics
- Discussing the importance of communicating with clients earlier on in their lives: building strong relationships from an early age
- What must be done to retain next-gen clients as digital competition grows?
- 'Good enough' isn't good enough anymore: to what extent will banks' digital services have to compete with the likes of Spotify and Amazon?

Dominic Snell**, Director of Consulting,* ***Wealth Dynamix
Chiara Gelmini**, Business Practice Manager,* ***Appway
Christine Wunderli,** Business Engineer Digital Wealth Management,* ***Vontobel

16.00 **Refreshment break**

SESSION FOUR | Disruptive forces transforming the industry

*Chaired by **Patrick Brusnahan**, Editor, **Private Banker International***

16.30 **Regulatory update in Switzerland: CDB 20**

- Uncovering the key amendments to CDB 20 and impacts on the banking industry
- How will these changes specifically impact KYC processes?
- From compliance controls to changes in identification: how can banks best prepare?
- How might employees need to be trained?

***Joseph Oumarou,** Assistant Vice President, **Banque Cantonale de Genève**, Professor of Finance*

16.50 **Understanding green revenues and climate risk exposure**

- Climate Risk – a new dimension within Government Bond portfolios
- How businesses are integrating sustainable investment and green revenues

David Harris**, Group Head, Sustainable Business, London Stock Exchange Group & Head of Sustainable Investment, **FTSE Russell

17.10 **Interview | Rise of the WealthTechs: friend or foe?**

WealthTechs and FInTechs have steadily entered the market, with new business models, lower charging structures and unique offerings that have been targeted at certain market segments. But how big of a threat are these agile players to private banks and wealth managers? How might partnerships be made to facilitate growth and innovation on both sides? What are the new players focusing on, and why? Get the answers to these questions and more during this exclusive interview.

Interviewer**: **Ian Woodhouse**, Head of Strategy and Change, **Orbium
Interviewee**: **Ludwig Ressner**, Managing Director, Senior Advisor, **Julius Baer**, Board Member, **F10 FinTech Incubator and Accelerator

17.30 **Panel discussion | Staying one step ahead of the curve**

*Chaired by **Ian Woodhouse**, Head of Strategy and Change, **Orbium***

- An inter-connected and secure industry: finding the balance between remaining compliant and creating seamless customer experiences
- Working towards a greener earth: what more can the industry do to drive positive change for the environment?
- Google, Amazon, Facebook, Apple: how can the industry compete with the tech-titans should they enter the word of private banking and wealth management?
- Blockchain disruption: will blockchain ever replace core banking?

Clemens Pieger**, Head of Zurich Branch, **Societe Generale
Noah Kraehenmann**, Regional Director CEE, **Temenos
David Harris**, Group Head, Sustainable Business, London Stock Exchange Group & Head of Sustainable Investment, **FTSE Russell
Marco Eichenberger**, Responsible Site Manager Zurich, **BNP Paribas

18.00 **Chair's closing remarks and end of conference,**

Patrick Brusnahan**, Editor, **Private Banker International

19.00 **Drinks reception followed by the Private Banking Switzerland 2019 Gala Awards Dinner**