The Private Banking & Wealth Management Conference
2nd March 2023
1 America Square, London EC3N 2LS

2ND MARCH 2023
PRIVATE BANKING & WEALTH MANAGEMENT
NEW REALITIES, NEW OPPORTUNITIES
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Welcome To The Private Banking & Wealth Management Conference

Official Event Programme

Please note that the following timings are flexible. Due to the nature of a live event, the conference chairs and organisers will be updating the timings throughout the day to adapt to speakers running over time, late arrivals, last minute changes and extending popular sessions. Please rest assured we will do our utmost to adapt and to accommodate all live changes.

Organised By:

GLOBAL INSIGHT CONFERENCES

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Registration & Informal Networking

08.30 – 09.10

GIC Welcome

09.10 – 09.15

Morning Chair's Opening Remarks

09.15 – 09.25

Christopher Rossbach, Managing Partner & CIO, **J. Stern & Co.**

Digital Transformation – Panel Discussion

09.25 – 10.00

Drive Digital Transformation & Your Digital Offerings Across Private Banking & Wealth Management To Improve The Client Experience

- How can you ensure you aren't losing clients because of the digital revolution? Leverage the benefits of digital tech from the onboarding process and throughout your clients' journeys to maintain and improve a seamless and efficient overall experience
- How can private banks overcome strict regulatory pressures and watertight data protection policies to drive digital transformation through the business, and implement new technology quickly and effectively?
- The digital evolvement of private banking: what are the themes and trends out there, will there be less human interaction, and more digital picking, and what are the benefits of various digital platforms, apps and robo-advice?
- Ensure you are a future-facing organisation by delving into the future of private banking and wealth management in a digital world where clients are becoming more sophisticated and digitally demanding

Jonathan Byrne, CEO, **Virgin Money Investments**

Alexander David, Head of Group Portfolio & Value Management Office, **Direct Line Group**

Wasim Mushtaq, Transformation Lead, Financial Markets, **Standard Chartered Bank**

Anthony Woolley, Head of Business Development, **Ownera**

Cryptocurrency

10.00 – 10.20

Investing In Future Technology

Duncan Moir, Senior Investment Manager, **abrdn**

How Tokenization Is Redefining Wealth Management

10.20 – 10.35

What Is Being Deployed By FI's In 2023?

Ami Ben David, Co-Founder & CEO, **Ownera**

Morning Refreshment Break With Informal Networking

10.35 – 11.05

ESG & Sustainability – Panel Discussion

11.05 – 11.50

Power Forward ESG & Sustainable Initiatives: Ensure Your Firm & Your Clients Are Committed To & Generate A Positive Impact On The Planet With Responsible Advice & Investments

- Keep up with rising expectations and regulations to increase your business standards without greenwashing by ensuring investments are effective and authentic
- What is the price of ESG principles? How can you strengthen ESG principles when they are not as lucrative?
- Making a difference: explore how you can assist private clients in achieving their philanthropic goals and give their investments a greater purpose than just profit

Celeste Leverton, Associate Director, Sustainability Manager, **Coutts & Co.**

Rennie Hoare, Partner & Head of Philanthropy, **C. Hoare & Co.**

Jean- François Le Ruyet, Partner, **Quilvest Capital Partners**

Amelia Tan, Head of Responsible Investing Strategy for Investments, **Legal & General Investment Management**

Jan-Marc Fergg, Global Head ESG & Managed Solutions, Global Private Banking, **HSBC**

Rory Dowie, ESG Portfolio Manager, **Credit Suisse**

Cara Williams, Senior Partner, Global Head of ESG & Sustainability, Wealth Management, **Mercer**

Digital Vs. Human Touch

11.50 – 12.10

Deliver With Digital! Meet Evolving Customer Needs & Service Expectations With A Client-Support Model That Capitalises On Digital Services Without Compromising On That Personal, Human Touch

- Finding the right balance: identify exactly what private clients are looking for today, and translate these into actionable insights by integrating digital at the right touchpoints along their digital journey
- Streamline your processes to optimise your work and satisfy client demands with advanced apps, digital channels and relationship management strategies
- What is the role of an advisor in the digital-first era? In this relationship-driven, client-facing industry, what is the future for private banking digitally?

Ben Covey, Managing Director & Head of Private Banking, **Santander Private Banking**

Demographics: Multi-Generational Strategies – Panel Discussion

12.10 – 12.45

Strengthen Your Client-Advisor Relationships With Refreshed & Robust Strategies Which Serve UHNW & HNWI's Of Any Generation & Seamlessly Engage The Whole Family

- Secure business-critical insights on how to engage millennials, Gen-Z and Gen Y in wealth management today, and how to retain client loyalty as wealth transfers down the multi-generational family line
- How are the younger generations approaching the world of wealth management today, and how are they managing their savings? Explore critical insights to help your strategies and build upon those relationships
- Navigate and meet the ever-changing needs and priorities of the younger generation with an increased demand for digital offerings and ESG-driven investments
- Prepare for the future and preserve wealth across the generation with robust and forward-thinking succession planning

Narina Tailor, Assistant Vice President & Private Banker, **Citi**

Veronique Morel-Kane, Senior Wealth Manager – Branch Principal, **Raymond James Investment Services**

James Bartolo-Smith, Assistant Vice President, **Barclays Private Bank**

Lunch For Delegates, Speakers & Partners

12.45 – 13.50

Informal Breakout Discussions

13.15 – 13.45

You Are Invited To Join One Of The Following Informal Peer-To-Peer Discussions Which Will Take Place During The Lunch Break

A) International Opportunities

B) Real Estate

C) Regulation

D) Apps

Afternoon Co-Chairs' Opening Remarks

13.50 – 14.00

Celeste Leverton, Associate Director, Sustainability Manager, **Coutts & Co.**

Veronique Morel-Kane, Senior Wealth Manager – Branch Principal, **Raymond James Investment Services**

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Client Acquisition, Relationships & Trends

14.00 – 14.20

Leading With Financial Education To Develop Data-Rich Pipelines Of Highly Engaged Prospects & Deepen Relationships With Existing Clients

Greg Kyle-Langley, Managing Director,
Head of Entrepreneurs Proposition, **Coutts & Co.**

Investing In A Challenging Market

14.20 – 14.40

Mitigate Market Volatility & Protect Your Clients' Wealth By Exploring Investment Strategies In Times Of Geopolitical Disruption & Challenging Inflationary & Economic Environments

- Assess the impact and outcome of political instability, geopolitical unrest, and economic difficulty has on the private banking and wealth management industry in order to effectively set the right priorities and follow client trends
- How can you beat inflation and keep your portfolios growing? Protect against the increase in costs with diverse and resilient investment frameworks
- Ahead of the curve: reassure your clients with investment outlooks and frameworks which help you prepare for, and mitigate, future risks and concerns

Willem Sels, Global Chief Investment Officer, Global Private Banking & Wealth, **HSBC**

Afternoon Refreshment Break With Informal Networking

14.40 – 15.10

Alternative Investments & New Opportunities – Double Perspective

15.10 – 15.50

High Risk, High Reward: Navigate The Risks & Opportunities Of Alternative & New Investments To Discover & Maximise New & Competitive Investment Opportunities For Your Clients

- Diversity your portfolios with unique private equity, investments in private markets, and hedge funds in your frameworks to boost returns, generate income and deliver results
- Invest with confidence: explore how the private banking industry has changed from a portfolio perspective through the rise of alternative and new investments
- Examine the potential pitfalls in mass marketable alternative investments to minimise risk for your private clients

15.10

Edmund Shing, Global Chief Investment Officer, **BNP Paribas Wealth Management**

15.30

Rex Kumaran, Chief Growth Officer, **illio**

Afternoon Co-Chairs' Closing Remarks & Official Close Of Conference

15.50 – 16.00

Celeste Leverton, Associate Director, Sustainability Manager, **Coutts & Co.**

Veronique Morel-Kane, Senior Wealth Manager – Branch Principal, **Raymond James Investment Services**

Many Thanks For Joining Us