

The Euromoney Global Private Banking & Wealth Management Virtual Event - now on demand

30 October - 31 December 2020

Online, United Kingdom

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conferences

Agenda

 Thursday 15 October 2020

10:00 - 16:00

Euromoney Global Private Banking & Wealth Management Conference 2020

Panel I: Global wealth trend: It's time for Plan B

- In the current fractious investment climate, what are you advising clients to do about rising global uncertainty? How do they plan to respond to an increasingly unpredictable world? Do they have a Plan B?
- Climate change presents an array of new risks and challenges. How do your clients plan to structure their wealth in a world threatened by wilder weather on the one hand and uncertain asset and stock prices on the other?
- Has political turbulence in the West made the rest of the world more attractive for HNWs and UHNWs? Where are they increasingly likely to put their money to work – have any markets gained or lost in terms of their attractiveness?
- The global real estate market offers a myriad of options for 'Plan B' relocation. What in your view are the top-five global property investment destinations?
- How are wealth structuring strategies changing, and how are service providers adapting to a new investment environment?
- London has long been a popular destination with HNWs looking for a safe haven. Have recent legislation changes and political uncertainties damaged London's attractiveness as a global wealth centre?
- Residency and citizenship: what are the options available worldwide? What markets are HNWs and UHNWs more attracted to, and less attracted to today, versus a few years ago?

Moderator:

Louise Bowman, Editor, *Euromoney*

Speakers:

Andrew L. Cohen, Executive Chairman, **J.P. Morgan Private Bank**

Nigel Green, CEO, **deVere Group**

Michel Longhini, Chief Executive Officer, Private Banking, **Edmond DeRothschild**

Greg Limb, Partner, **KPMG**

Beatrice Puoti, Partner, **Burges Salmon**

Panel II: Gen Z: Preparing to engage the Greta Thunberg generation

- Are millennials old news? As the succeeding generation enters its 20s, is it time to start thinking about engaging the next demographic?
- Gen Z is said to be more money-conscious and financially literate than any previous generation. How will the needs of Gen Z private banking clients differ from millennials, and

from older clients?

- The best wealth management providers like to offer classes, workshops and other initiatives for educating the next generation and promoting entrepreneurship and leadership. How do banks fare in their roles as educators? What is industry best practice?
- Studies show Gen Z to be increasingly visually driven, with a mobile-first mindset. Which digital technologies do banks need to adapt today to be ready to engage the clients of tomorrow?
- Millennials are said to be more focused on impact investing, ESG and philanthropy than older clients, will this trend continue with Gen Z?

Gen Z will be the most racially and ethnically diverse generation in history. Are banks well placed to react to this internally, ensuring their relationship managers come from diverse backgrounds?

Moderator:

Elliot Wilson, Global Private Banking and Wealth Management Editor, **Euromoney**

Speakers:

Effie K Datson, Global Head of Family Office, **Barclays Private Bank**

Money K, Global Head of Next Generation, **Citi Private Bank**

James Sefton, Professor of Economics, **Imperial College**

Dominic Samuelson, Chief Executive Officer, **Campden Wealth**

Viola Werner, Global Head of Next Generation and Families Department, **Credit Suisse**

Panel III: BRICS private banking roundtable: Brazil, Russia, India, China, South Africa.

- How are clients in the BRICS markets engaging with the current key trends in Europe and the US, such as sustainability and ESG, gender, growing life expectancy, technology integration and improvement of client experience?
- What do HNWs across Brazil, Russia, India, South Africa and China invest in? What are the popular asset allocation strategies?
- Are clients looking to go global or do they mainly want to put their money back into the industries and communities where they made it?
- It is a common narrative that a lot of wealth in these economies is first generation. Do we see a trend in rising demand in for wealth succession services in the BRICS markets? What opportunities present themselves to wealth managers in the space?
- What trends do you see in the growth, sophistication and requirements of family offices in Asia, Russia, India, South Africa and Brazil? It's often assumed that Western family offices still lead the way in terms of creativity and innovation in FOs, particularly those in the US and Europe, but is this still true? Are family offices in the emerging markets more risk-and-reward heavy than their Western counterparts?

Moderator:

Chris Wright, Asia Editor, **Euromoney**

Speakers:

Oisharya Das, Chief Executive Officer, **Kotak Wealth Management**

Maya Imberg, Senior Director, Thought Leadership & Analytics, **Wealth-X**

Rogério Pessoa, Head of Wealth Management, **BTG Pactual**

Veronika Zhukova, Managing Director, **Sber Private Banking**

Panel IV: The realities of socially responsible investment 2020

- Clients have become increasingly interested in SRI. As a result client demands have become more sophisticated. As clients demand a more personalised sustainable investment experience, what tools and products do relationship managers need to be able to offer? How well are they meeting client needs?
- One criticism often aimed at SRI investment practices is the shortage of innovative, high-performance assets, is this an issue you have had to face? How have you addressed it?
- New amendments to MIFID II, expected to be introduced in 2021, will mean advisers, as part of their KYC, will need to take an active role in discussing ESG preferences with clients. How will greater regulatory scrutiny affect the SRI microcosm? Are advisers ready to have a more in-depth ESG conversation?
- What are the common methodologies of sustainability rating used by private banks and their clients? Is there a discrepancy between the data available and the data the clients would like to see? How do different ratings perform in terms of consistency, complexity and comparability?

Moderator:

Helen Avery, ESG Contributing Editor, **Euromoney Magazine**

Speakers:

Amir Amel-Zadeh, Associate Professor, **Saïd Business School**

Cléo Fitzsimons, Sustainable Investment Lead, **Cazenove Capital**

Guillermo Hermida, ESG Strategy Director, **CaixaBank Private Banking**

Michael Meehan, Chairman, **UKSIF**

Gordon Power, Co-Founder and Chief Investment Officer, **Earth Capital**

Panel V: The hidden value proposition

- What forms of technology are private banks and wealth managers investing in?
- Can new forms of digital technology and communication be used to drive portfolio performance up and costs down? How?
- How much of a threat do technology-led non-banks keen to enter the financial services sector pose to the existing order of commercial lenders and the pure-play operators providing existing private banking advice? Who are the best examples of disruption here and in what markets?
- How are you using technology to streamline, cut costs, access new customers, and boost portfolio performance, in and around your private banking operations?
- Will direct, longstanding private banking relationships between bank and customer always trump anything that technology can offer? How can the two work together?
- What role can AI play in private banking? What are AI's limitations, at present and further ahead?
- Does the older generation engage with technology — and how are you encouraging them to do so
- How can technology help with the compliance burden in private banking?

Moderator:

Mark Baker, Deputy Editor, **Euromoney**

Speakers:

Francois Botha, Founder, **Simple**

Craig Iskowitz, Founder & Chief Executive Officer, **Ezra Group**

Evgeny Kochemazov, Chief Investment Officer for A-Club, **Alfa-Bank**

Christopher Sparke, Global Head of Advisory Solutions, **Refinitiv**

Closing debate: Global private banking debate

- Increasing global transparency is a powerful force of change in the industry. But there is naturally going to be a higher level of focus on transparency in some markets than in others. How do you deal with that dichotomy?
- Compliance costs are rising around the world, globally, locally and intra-regionally. How do you keep a handle on costs? Is the greatest source of new regulation the EU?
- How have recent regulatory changes affected your business? What specific rule changes do you spend most of your time talking about, on the one hand in-office with fellow RMs, and on the other hand with clients?
- Are wealth management institutions doing enough to work to the strengths of women, both as RMs and as clients? If they are falling short, where is that happening?
- Do you offer specific products aimed at female clients? Do women prefer to work with female relationship managers?
- How are younger relationship managers changing the business internally? Do new talented RMs have different aims and ambitions from the previous generation, from flexible timekeeping to expecting to be challenged, to having ambitious ESG expectations of their own, that they want their employer and clients to meet?
- Private equities vs bankable assets: discuss the latest asset allocation trends.
- How do you help clients integrate philanthropy into their wealth management strategy? What do client expectations look like in philanthropy and in ESG? Discuss the methodologies of quantifying and evaluating impact.
- Cybersecurity is a growing concern across the industry. What steps are you taking to guarantee you will not find itself a target of a digital hack or targeted security breach?
- The past decade has been good to the industry. Challenging, yes, with the level of digital disruption and compliance cost challenges. But it has rewarded those with wealth to protect. What do the 2020s hold? What regulatory risks or economic opportunities does this decade present?
- Profitability and growth: with margins getting thinner, how are you looking to continue to generate strong returns?
- Much is said about engaging the younger generation, with trillions of dollars' worth of HNW and UNHW wealth set to change hands this decade. But what of older clients: how do you engage with them? Is the older generation exhibiting any shift in brand loyalty toward their primary wealth management provider? Are older clients as interested as younger generations in new ideas and innovations?

Moderator:

Elliot Wilson, Global Private Banking and Wealth Management Editor, **Euromoney**

Speakers:

Emma Crystal, Head of IWM Northern & Western Europe and Head of Sustainable Client Solutions, **Credit Suisse**

Robert Gardner, Director of Investments, **St. James's Place Wealth Management**

Augusto Miranda, Global Head of Private Bank, **Bradesco**

Mei Yufang, Deputy General Manager, **China Construction Bank**

Veronika Zhukova, Managing Director, **Sber Private Banking**

of such statements.