ARENA
INTERNATIONAL EVENTS GROUP

PRIVATE BANKING & WEALTH MANAGEMENT LONDON CONFERENCE & AWARDS 2023

The Waldorf Hilton London, UK

14th June 2023

REGISTER NOW

Key Speakers:

Shamik Dhar, Chief Economist, BNY Mellon
Alexander Stumpfegger, Chief Sales Officer, CID
Per Wimmer, CEO, Wimmer Family Office
Keith Wade, Chief Economist and Strategist, Schroders
Anita McBain, Head of EMEA ESG Research, Citi
James Dunne, Head of Wealth Management & Insurance, Santander
Peggy Smith, Global Head of ESG Solutions, HSBC Global Private Banking
Jeremy Parlons, Founder & Managing Partner, Bainbridge Wealth
Rennie Hoare, Partner and Head of Philanthropy, Hoare & Co
James Sellon, Co-Founder, Maseco Private Wealth
Tamara Kostova, CEO, Velexa
Antonio Curia, Sr Executive Director, Wimmer Family Office
Ian Woodhouse, Lead Wealth Management Transformation and Thought Leader for Europe, Accenture
Nico Marchesotti, Vice President Research & Product Management, JP Morgan
Nick Davis , Investment Director, Oakglen Wealth
Narina Tailor, Assistant Vice President & Co-Head Next Generation Initiative, Citi
Marc Mettler, Board Member & Managing Partner Business Development, 3rd-eyes analytics
Alberto Turra, Head of Sales, Leonteq
Christine Ciriani,Chief Revenue Officer, International & General Manager, APAC, InvestCloud
Alessandro Tonchia Head of Strategy, EMEA & Asia, InvestCloud
Fella Kheligy-Arnulphy, Head of Advisory Solutions, EFG
Prabhakar Kaza, CEO, Hamilton Reserve Bank
Nuno Godinho, Group CEO, Industrial Thought Ltd.
Frederic Carbonnier, Managing Director, Helms Family Office
Shimona Pinto, UK Country Manager, MOXO
Robert Roome, Chief Strategy Officer, Wealth Dynamix

08:00 – 08:50	**Registration**
08:50 – 09:00	**Chair's opening remarks** **Ian Woodhouse,** Lead Wealth Management Transformation and Thought Leader for Europe **, Accenture**
SESSION ONE: Key Economic Themes Of 2023 **Chair:** **Ian Woodhouse, Lead Wealth Management Transformation and Thought Leader for Europe , Accenture**	
09:00 – 09:20	**KEYNOTE ADDRESS: Transitions: a New World Economic Order** • The world is going through an important economic and investment transition, finally emerging from the post-GFC low-inflation, low-rate regime • This will mean volatility in the short run, but will ultimately be a more sensible world for investors • There are 4 key themes that will dominate the investment landscape over the longer term: demographics; geopolitics; climate; and technology **Shamik Dhar,** Chief Economist, **BNY Mellon**
09:20 – 09:40	**Secret to improving client engagement? Happier advisors.** In this presentation, Christine Ciriani (International Chief Revenue Officer, InvestCloud), will discuss the how advisor efficiency correlates directly with improved client engagement, how the industry is embracing AI enabled tools, and provide an showcase how the power of data is improving performance by learning from experience. **Christine Ciriani,** Chief Revenue Officer, International & General Manager, APAC, **InvestCloud**
09:40 – 10:00	**The seven Wimmer values, the ventures, and vision of Per Wimmer** • Exploring the key drivers of Pers entrepreneurial and philanthropic mindset • The sky is no limit: don't follow a manual, write one • Discussing how Pers life and experiences have led to the formation of a septenary of simple rules in which to flourish, evolve and make a difference **Per Wimmer,** CEO, **Wimmer Family Office**
10:00 – 10:20	**Control the Chaos of Managing Client Business - Extend your existing client business processes with digital interaction workflows in your own private channel.** • Provide a private, personalized, and modern client experience in a digital world to increase retention and drive operational efficiency. • Streamline client-centric processes such as account acquisition, onboarding, and ongoing account servicing. Drive the responsiveness of your team.

	• Manage client account control - with a complete audit trail, roles, and seamless transfer of account interactions across staff. • Coordinate with your clients, partners, and teams to achieve joint deliverables, hit milestones, gather approvals, and more. • -Rethink today's costly, inefficient, and fragmented client interaction model requiring significant manual intervention. **Shimona Pinto,** UK Country Manager**, MOXO**
10:20 – 10:40	**Outlook 2023, Global economy: all eyes on inflation** • The price of taming inflation • Rate hikes to become cuts by 2023 end? • Risks skewed towards stagflation **Keith Wade,** Chief Economist and Strategist**, Schroders**
10:40 – 11:00	**Panel Discussion | The crystal ball: what does the future hold for private banking and wealth management?** • Let's put the situation under context: Looking ahead in an era of economic uncertainty will inflation continue to rise or has it peaked? • What this environment means for Advisors? And what are the implications for the Industry • Delving into the current state of capital markets, what should we expect going forward? **Moderator:** **Antonio Curia,** Sr Executive Director, **Wimmer Family Office** **Shamik Dhar,** Chief Economist, **BNY Mellon** **James Sellon,** Co-Founder**, Maseco Private Wealth** **Robert Roome,** Chief Strategy Officer, **Wealth Dynamix** **Tamara Kostova**, CEO, **Velexa** **Alessandro Tonchia,** Head of Strategy, EMEA & Asia, **InvestCloud**
11:00 – 11:30	**Morning refreshments and networking**
SESSION TWO: Sustainable Investing **Chair:** **Ian Woodhouse, Lead Wealth Management Transformation and Thought Leader for Europe , Accenture**	
11:30 – 11:50	**Sustainable Investing: Aligning Financial Growth with Environmental and Social Responsibility** Inspiring Change: Exploring the transformative potential of sustainable investing, creating a greener and more ethical future. Innovating Strategies: Examining innovative approaches and investment vehicles driving sustainable development and financial returns. Impacting Society: Understanding how sustainable investing positively influences society, fostering equity and sustainability.

	Prabhakar Kaza, CEO, **Hamilton Reserve Bank**
11:50 – 12:10	**A tale of two firms: How digital transformation enables firms to scale AuM without scaling costs** Scaling Wealth Management and Private Banking in a Digital-first world **Robert Roome,** Chief Strategy Officer, **Wealth Dynamix**
12:10 – 12:30	**Financing a greener planet: the ecosystem at the heart of business** • Closing the gap between academic and policy literature and the perspective of the business and investor community • Introducing the FCA's new SDR measures aimed at clamping down on greenwashing, what you need to know • Integrating the protection of biodiversity into the fiduciary duties of institutional investors and assets managers increases in significance **Anita McBain,** Head of EMEA ESG Research**, Citi**
12:30 – 12:50	**The Implications of Climate Change on Wealth Management** Why is it relevant? How does it affect clients? How to cope with it? To model future wealth realistically, climate change must be considered in wealth planning. However, the main problem is that both institutional and private investors cannot draw any conclusions about the impact rising temperatures have on their wealth or financial goals. 3rd-eyes analytics makes the impact of climate change tangible, by showing how it affects your portfolio and your financial goals, how the impact can be mitigated and offer solutions on how to further reduce the CO2 footprint. **Marc Mettler,** Board Member & Managing Partner Business Development**, 3rd-eyes analytics**
12:50 – 13:10	**Panel Discussion | Investing with purpose: solidifying sustainable business strategies** • How do you see demand for sustainable and purposeful investing evolving across the various client segments (Premier and UHNW), across the intergenerational demographics and the key geographic regions and what are the key differences and trends? • What are the challenges and opportunities involved in upskilling advisors to better engage clients in sustainable and purposeful investing and how can education, tools and other interventions help both clients and advisors better identify opportunities? • How can we better report to clients on the outcomes of their sustainable and purposeful investments and what approaches, tools and other elements can help with this? • Where do you see future innovations in sustainable and purposeful investing going and what are your firms priorities for 2023/24? **Moderator:** **Ian Woodhouse,** Lead Wealth Management Transformation and Thought Leader for Europe **, Accenture** **Peggy Smith**, Global Head of ESG Solutions, **HSBC Global Private Banking** **Marc Mettler,** Board Member & Managing Partner Business Development**, 3rd-eyes analytics** **Fella Kheligy-Arnulphy,** Head of Advisory Solutions, **EFG**
13:10 – 14:10	

	Lunch & Networking
SESSION THREE: Digital Integration and Client Experience **Chair:** **Ian Woodhouse, Lead Wealth Management Transformation and Thought Leader for Europe , Accenture**	
14:10 – 14:30	**Embracing new technologies to deliver hybrid servicing and create a highly differentiated, cost effective service proposition for existing and future clients.** • Seizing the challenge of delivering true end-to-end hyper-personalised products and services, increasing customer engagement and improving experience to gain advantage over your competitors • Improving capabilities for data analytics and ethnography to truly leverage vast databases and explore, measure and predict online client behaviour to fine tune and personalise products • Widening product functionality innovation in order to meet customers needs and deliver the most relevant financial opportunities efficiently through applying basic research and routine innovation **James Dunne,** Head of Wealth Management & Insurance, **Santander**
14:30 – 14:50	**Drive Growth with Sharper Prospecting and Personalized, Thematic Investment Products powered by AI** • Identify business opportunities with (U)HNWIs • Strengthen relationships with existing clients • Drive personalization and find alpha for clients with thematic investment products **Alexander Stumpfegger,** Chief Sales Officer**, CID**
14:50 – 15:10	**The Problems Asset Managers are facing: Risk and Performance in a Digital environment** • The Future for HELMS, and others alike, Lies in a digital space by bringing best of breed robust systems, including Technology, Artificial intelligence, to provide our clients and peers with a well-engineered platform. • HELMS wants to embrace change ahead of the curve to deliver an all –encompassing investment management solution in line with the existing and future trends. • Management fee isn’t enough. Performance is what we need to tackle to stand a chance to meet clients’ needs and this is how we will differentiate ourselves from our competitors going forward. **Frederic Carbonnier,** Managing Director, **Helms Family Office**
15:10 – 15:30	**LynQs: Your one-stop-shop for structured products** • Leonteq as structured product specialist • Multi-issuance platform • LynQs modules • Mobile app • Case study of a Swiss Private Bank **Alberto Turra,** Head of Sales**, Leonteq**

<table>
<tr><td>15:30 – 16:10</td><td>Panel Discussion | Shake your tail feathers: Attracting a new and diverse client base

• Understanding the reasons why inheritors of wealth will not necessarily stay loyal to their parents private banking organisation, how to gain a competitive edge for their business
• Comprehending the need to implement financial education, sustainability and digitalisation into design of onboarding strategies for millennials
• Determining millennials preferred forms of investment; crypto-currency to real estate

Moderator:
Ian Woodhouse, Lead Wealth Management Transformation and Thought Leader for Europe , Accenture

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Marc Mettler, Board Member & Managing Partner Business Development, 3rd-eyes analytics
Karrie Tilburn, CEO, KA Watson Consultancy</td></tr>
<tr><td>16:10 – 16:40</td><td>Mid-Afternoon Refreshments</td></tr>
<tr><td colspan="2">SESSION FOUR: Investments and Products
Chair:
Ian Woodhouse, Lead Wealth Management Transformation and Thought Leader for Europe , Accenture</td></tr>
<tr><td>16:40 – 17:00</td><td>Merging investments and philanthropy for social impact

• Donor-advised funds, helping customers to get on with the giving
• Strategies to assess and support charities in immediate need
• Building back better, a role for philanthropic scaffolding

Rennie Hoare, Partner and Head of Philanthropy, Hoare & Co.</td></tr>
<tr><td>17:00 – 17:30</td><td>Panel Discussion | The age of diversification: Exploring alternative & new investments

• What are you seeing in the evolution of what clients want, in terms of their values, behaviours, expectations, asset allocation preferences for impact investing and alternatives.
• What are the opportunities and risks for clients to be aware of with alternative and impact investing ?
• What are you seeing in terms of better reporting to clients on the outcomes of their impact and alternative investments?
• Where do you see alternatives and impact investing going - are we at the early stages of the innovation cycle and what could we see going forward ?

Moderator:
Ian Woodhouse, Lead Wealth Management Transformation and Thought Leader for Europe , Accenture</td></tr>
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	Rennie Hoare, Partner and Head of Philanthropy**, Hoare & Co.** **Nick Davis ,** Investment Director**, Oakglen Wealth** **Jeremy Parlons**, Founder & Managing Partner, Bainbridge **Wealth**
17:30	**Conference close and Chair's closing remarks** **Ian Woodhouse,** Lead Wealth Management Transformation and Thought Leader for Europe **, Accenture**
18:30 – 19:30	**Drinks Reception**
19:30 – late	**Private Banking & Wealth Management Awards Ceremony and Dinner**