EUROMONEY SEMINARS

13 & 14 November, 2008
Renaissance Harbour View Hotel, Hong Kong

4th Annual

Private Wealth Management Forum

Preserving and extending the family wealth

Save up to US$600 Book before 26 September, 2008
(see back page for details)

- Winning strategies for large and boutique private banks
- Manging a family office and structuring for the ultra wealthy
- Succession and tax planning in the Asian family business
- Wealth preservation – managing your clients' risk appetites

Featuring a senior gathering of speakers, including:

- **Kathryn Shih,** CEO Wealth Management, Asia Pacific, **UBS AG**
- **Anuj Khanna,** Managing Director, Head of Private Banking, North Asia, **Credit Suisse**
- **Phil Neilson,** CEO, **The Henley Group**
- **Stephen Richards Evans,** Regional Head, North East Asia, **The Standard Chartered Private Bank**
- **Dr. V. Anantha Nageswaran,** Head of Investment Research for Asia and Middle East, **Julius Baer**
- **Y.N. Nagendra,** Managing Director, Global Head of Marketing, **ING Bank**
- **Bruce VonCannon,** Chief Representative, **Banque Privée Edmond de Rothschild S.A.**
- **Claude Haberer,** CEO, Hong Kong and North Asia, **BNP Paribas Private Bank**
- **Agnes Au Yeung,** Head of Family Wealth Advisory, **HSBC Private Banking**
- **Christian Stewart,** Founder, **Family Legacy Asia**
- **Andrew Freris,** Senior Investment Strategist, **BNP Paribas**
- **Peter Bennett,** Senior Partner, **Gottex Fund Management Hong Kong**
- **Richard Yetsenga,** Director, Head Asian FX Strategy, **HSBC**
- **Werner Schlossmacher,** Structured Product JV & FX Asia, **Barclays Capital & Wealth**
- **Andrea Benenati,** CEO North Asia, **Julius Baer**
- **Geoffroy Dedieu,** Managing Director, Head of Family Services Bank, **Julius Baer**
- **Terry Alan Farris,** Global Head of Strategies, **AMMADO**
- **John CW Wong,** Partner, Tax, Personal Financial Services Practice - Private Clients, **PricewaterhouseCoopers**
- **Kennth Ho,** Managing Director, Head of Products, Asia Pacific, **Julius Baer**
- **Philip Kemke,** Head of Investor Structuring and Sales for Commodities, **Citi**
- **Pieter Oyens,** Head of Asia Fund-linked Derivatives, **ABN AMRO**
- **Bernard Rennell,** Managing Director, Asia, **HSBC Trustee (Hong Kong)**
- **Hsiao-yuen Lee,** Managing Director, Head of Greater China Region, **SG Private Bank**
- **Eng Huat Kong,** Managing Director, Global Wealth Management, **Merrill Lynch International Bank**
- **Jae Y Lee,** Head of Equity Structured Products and Alternative Investment Sales for Southeast Asia and Korea, **Merrill Lynch**
- **Gloria Yu,** head of Private Banking Sales, **Credit Suisse**

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Media partners:

13 & 14 November, 2008
Renaissance Harbour View Hotel, Hong Kong

4th Annual

Private Wealth Management Forum

Preserving and extending the family wealth

Asia is home to the more than a quarter of the world's high net-worth individuals. The need for private banking is increasing as their combined riches are projected to be over $12,700 billion by 2011. What can private banks be doing to capitalise on this projected growth?

The **4th Annual Private Wealth Management Forum** will once again bring together the leading private banks and investment advisors to identify the opportunities and challenges facing this market, and discuss strategies for the time ahead.

Key issues for discussion include:

- Winning strategies for large and boutique private banks in emerging markets
- Merging the investment banking and private banking platforms – how to create synergies?
- Protecting your clients' wealth under volatile market conditions
- Capturing the undervalued assets around the globe – what are the best investments?
- Trends in Asian family offices
- Trust advising and succession planning

On 13 & 14 November, the Forum will welcome back over 150 of the region's most senior private bankers to Hong Kong - register now to join them. **Register now!**

What our delegates said about the 3rd Annual Private Wealth Management Forum:

"Excellent conference with truly high level of delegates and speakers attending. Excellent for networking."

Harmen Overdijk, Fortis Commercial and Private Banking Asia

"Very insightful two day summit with high quality speakers willing to share strategic and tactical information"

Hans Diederen, ABN AMRO

"Content, presenters and facilities are very good"

BK Jung, Samsung Securities

"The topics and discussions are of good quality. Speakers are also well qualified."

Grace Chow, Bank of East Asia

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4th Annual Private Wealt

Day One: Thursday, 13 November 2008

08.30

Registration and morning coffee

09.00

Chairman's welcome and opening remarks

09.10

Keynote: Opportunities and challenges for the Asian private banking industry

- Trends in the Asian private banking industry in a global context
- Challenges for safe-guarding your clients' wealth under the current market conditions
- Generating new clients amidst the intense competition
- Tapping the emerging private wealth of China and India

Kathryn Shih, CEO Wealth Management, Asia Pacific, **UBS**

09.40

Institutionalising the client relationship: Merging the investment and private banking platforms

- Challenges for creating a one stop service platform
- Interactions of two platforms
- Solving the conflicting objectivities
- Applying investment banking risk management practice to your clients' portfolio

Anuj Khanna, Managing Director, Head of Private Banking, North Asia, **Credit Suisse**

10.10

Panel discussion: Strategies for success

- Impact of subprime on the private banking industry
- Dealing with reputational risks
- Pursuing market share vs profitability
- Succession planning for private banking talents – acquisition growth vs organic growth
- Choosing the business models – fee-based model vs brokerage-based model
- Dealing with increased cost of hiring
- Generating new clients

Claude Haberer, CEO, Hong Kong and North Asia, **BNP Paribas Private Bank**

Andrea Benenati, CEO, North Asia, **Julius Baer**

Euromoney Seminars is a division of Euromoney Institutional Investor (Jersey) Limited.

10.55

Networking coffee break

11.35

Boutique private banking in Asia

- Competition landscape
- What are the core strengths?
- Does the Swiss private banking model work in emerging markets?
- How to differentiate yourself
- Access to products
- How to utilise your human capital and recruiting the talent

Bruce VonCannon, Chief Representative, **Banque Privée Edmond de Rothschild S.A.**

12.05

How to orchestrate the response to your clients

- Dealing with your client global needs
- How to become a successful conductor
- Managing and enhancing the client relationship
- Orchestrating resources and information

Agnes Au Yeung, Head of Family Wealth Advisory, **HSBC Private Banking**

12.40

Lunch

14.00

Structuring for the ultra wealthy

- Key issues facing complex family offices
- Getting the family governance arrangements right
- The use of private trust companies - when it's appropriate and when it's not
- Integrating governance and structure

Bernard Rennell, Managing Director, Asia, **HSBC Trustee (Hong Kong)**

14.30

Trends in Asian family offices: Is it all about family?

- Criteria for MFO or SFO
- Pitfalls and trends
- Ownership of family office
- What family members should expect from their family office?
- Identifying the risks in legal, financial and fiscal arrangements
- Successful ways to grow family wealth
- How can you acquire new UHNWI clients?

Geoffroy Dedieu, Managing Director, Head of Family Services, **Julius Baer**

15.00

Wealth therapy: Philanthropy

- Current trends in giving
- Examining the concepts and challenges of entrepreneurial philanthropy
- Structure of family governance
- Developing the family strategies
- Collaboration between financial advisors and philanthropic advisors
- Dos and don'ts in family engagement

Terry Alan Farris, Global Head of Strategies, **AMMADO**

15.30
Networking coffee break

16.00
Succession planning in Asian family business

- What is succession planning ?
- Core issues for planning
- What can go wrong with devolution of wealth?
- Avoiding disputes

Christian Stewart, Founder, **Family Legacy Asia**

16.30
Market segmentation in China and India

- Overcoming the constraints in emerging markets
- Client segmentation
- Relationship management segmentation
- Matching client and relationship segments

17.00
Panel discussion: Think global and act local - coping with growth in China and India

- Commonalities and differences between the two markets
- Evolution of private banking
- Entry strategies and business models
- Product range and services scope
- Onshore private banking vs offshore private banking - where is the opportunity?
- Finding and retaining talent

Hsiao-yuen Lee, Managing Director, Head of Greater China Region, **SG Private Bank**
Stephen Richards Evans, Regional Head, Private Bank, North East Asia, **The Standard Chartered Private Bank**
Y.N. Nagendra, Managing Director, Global Head of Marketing, Sub-continent Clients, **ING Bank**
Bruce VonCannon, Chief Representative, **Banque Privée Edmond de Rothschild S.A.**
Kennth Ho, Managing Director, Head of Products, Asia Pacific, **Julius Baer**

17.45
Close of Day One followed by evening cocktail reception

Euromoney Seminars reserves the right to alter the venue and/or speakers.

Day Two: Friday, 14 November 2008

08.30
Registration and morning coffee

09.00
Chairman's opening remarks

09.10
Wealth preservation

- Managing your clients' risk appetites
- Operating in a distressed market - new risks vs new opportunities
- Clients' reactions to global market volatility - how to instil confidence in your client
- Profiling your clients risk appetites and providing portfolio diversification
- How to differentiate yourself as a trust advisor – product and service vs skill and expertise

Phil Neilson, CEO, **The Henley Group**

09.40
Trends in structured products

- Explaining the risk to your clients
- What are the hottest asset classes?
- Impact of volatility on structured products

10.10
What to invest in around the globe

- Equity and credit vs distressed debt
- Commodity vs alternatives
- FX vs rates
- Alternative investments
- Asset allocation strategies

Peter Bennett, Senior Partner, **Gottex Fund Management Hong Kong**
Richard Yetsenga, Director, Head Asian FX Strategy, **HSBC**
Andrew Freris, Senior Investment Strategist, **BNP Paribas**
Dr. V. Anantha Nageswaran, Head of Investment Research, Asia and Middle East, **Julius Baer**

10.55
Networking coffee break

11.25
Considerations in wealth planning

- Establishing the objectives
- Effectively using the tools
- Tax considerations

John CW Wong, Partner, Tax, Personal Financial Services Practice - Private Clients, **PricewaterhouseCoopers**

um

11.55
Indonesia
- Why you want to enter the market
- Environment for private banking
- Private banking structures - onshore vs offshore
- Clients' needs
- Availability of investment opportunities

Eng Huat Kong, Managing Director, Global Wealth Management, **Merrill Lynch International Bank**

12.25
Taiwan
- Size of the markets
- Legal and commercial environment
- Limitations in private banking
- Mass affluent vs HNWIs - where is the growth?
- Opportunities for offshore private banking

12.55
Lunch

14.20
Panel discussion: Bartering for your clients profitability through open architecture
- Reinstilling investors' confidence
- Measuring the profitability
- Access to products vs wealth management - what matters most to your clients?
- Cost concerns when adding to the profit line
- Impact of rapid product development on middle-back office infrastructure and regulatory compliance

Gloria Yu, head of Private Banking Sales, **Credit Suisse**
Werner Schlossmacher, Structured Product JV & FX Asia, **Barclays Capital & Wealth**

15.05
Panel discussion: Client preferences in structured products
- What are the major risks to invest in structured products?
- Understanding the exotic instruments
- Commodities vs equities
- Inflation-linked products vs fund-linked products
- Structure vs leverage
- G7 vs G3
- Liquidity vs volatility

Philip Kemke, Head of Commodity Investor Structuring and Sales, **Citi**
Pieter Oyens, Head of Asia Fund-linked Derivatives, **ABN AMRO**
Jae Y Lee, Head of Equity Structured Products & Alternative Investment Sales for Southeast Asia and Korea, **Merrill Lynch**

15.45
Chairman's closing remarks and close of conference

Companies who have attended the Private Wealth Management Forum in previous years

ABN AMRO Private Banking
AIG Private Bank
American Express Bank
Anglo Irish Bank
Ask Investment Managers
Bangkok Bank
Bank of East Asia
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Rothschild Bank
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Ski Capital Services
Société Générale
Stanton Chase International
Tru-Est
UBS
Webbe International (Greater China)
White & Case
Whitney Group
Zurich

Registration Fees

	Standard conference fee	Early registration fee (book before 26 September, 2008)
One delegate	US$2,499	US$2,299 (saving US$200)
Two delegates	US$4,698 (saving US$300)	US$4,398 (saving US$600)

Please quote EAE170 on all correspondance

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Administrative Information

Venue:
Renaissance Harbour View Hotel
1 Harbour Road
Wanchai
Hong Kong
Tel: +852 2802 8888
Fax: +852 2802 8833

Travel & Accommodation:
Euromoney Seminars has negotiated a special group rate at the Renaissance Harbour View Hotel for conference attendees. Full details will be provided with the joining instructions sent on receipt of booking. If you have any questions in this regard, please contact Winnie Wong, Logistics Manager on (HK) +852 2842 6912 or email winnie.wong@euromoneyasia.com.

Cancellation policy: If you cannot attend you **must cancel your registration in writing by 30 October 2008** to receive a refund less a 10% administration charge. We cannot accept verbal cancellations. **Cancellations received after 30 October 2008 are liable for the full conference fee**. We suggest you send a substitute to attend in your place at no extra charge.

Registration fee: The registration fee includes participation in the conference, lunch and documentation material, which will be distributed at the beginning of the event. All bookings are considered binding on receipt of the booking form.

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