

*The 16th Annual*  
**116** *& Wealth Management*  
*Private Banking Asia* **19**

# ***The 16th Annual Wealth Management Private Banking Asia***

Gaining Long-Term Advantages in Change

Dec. 11th-12th, 2019 | Shanghai, China





## ***Background***

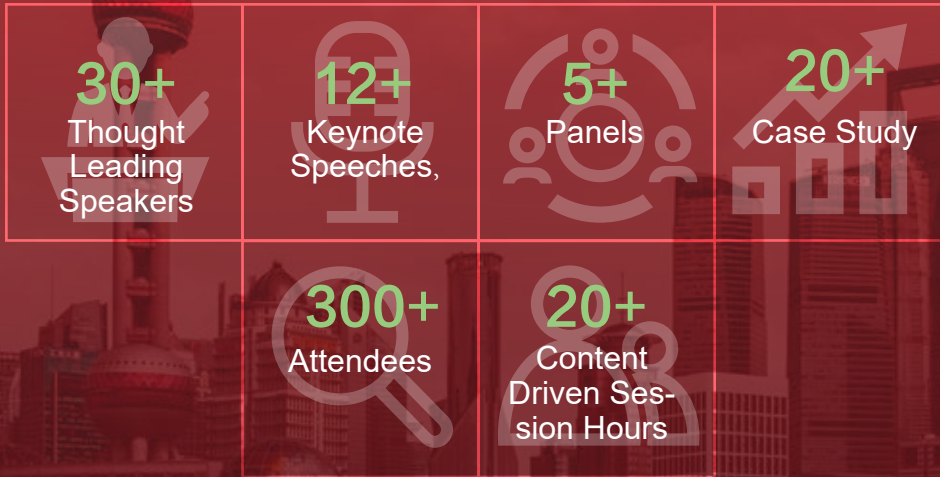
China Private Banking 2019 points out that China's economic environment is facing unprecedented challenges in recent years. Since the impact of the new asset regulations, the business model and competitive pattern of wealth management will be reconstructed, and the demand for wealth management of China's HNWs is undergoing structural changes. For private banks and other wealth management organizations, how to seize the opportunities and steady develop in the evolving regulatory market has been an important topic from now on.

In this background, the 16th Annual Wealth Management & Private Banking Asia hosted by Shine Consultant will be held on Dec.4th-5th in Shanghai. This annual will gather more than 300 high-level leads and professionals coming from the government and association, private banking, family offices, wealth management and asset management companies, trust, securities firms, fintech companies to have in-depth discussion how to stick to the source in the market transition, grasp the development opportunity through innovation, and then building long-term advantage.

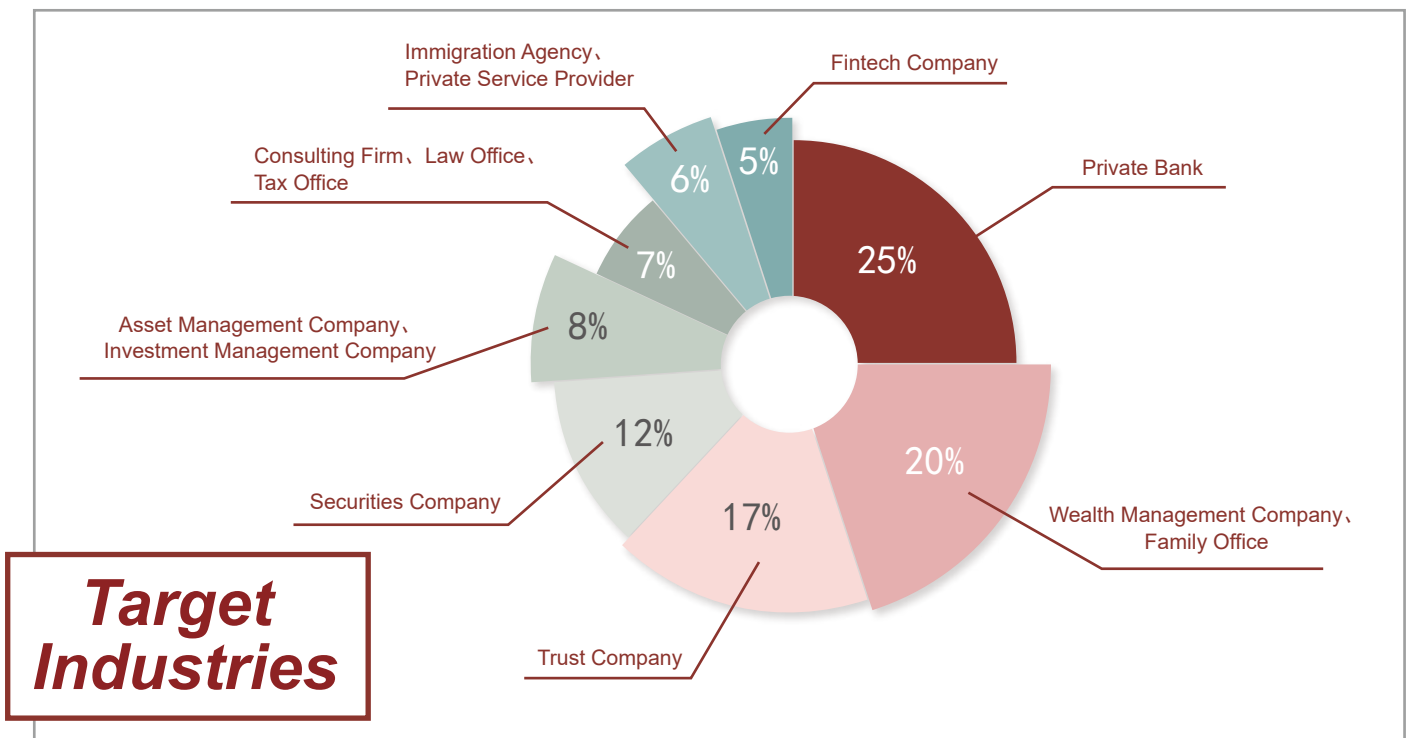
## ***Key Issues***

- » 2020 APAC Wealth Management Outlook
- » The New Pattern under the Rise of Banking Wealth Management Companies
- » Strategic Value and Investment Outlook of Global Asset Allocation
- » 「Supply Side Reform」 of Chinese Private Banking
- » The Dilemmas and Solutions of Digital Wealth
- » Management of Private Banking
- » The Deep Thought of Family Wealth Succession in the New Era
- » How is the Family Trust offering in China Developing after the Release of Trust Rules
- » The Trends and Best Practice in Digital Wealth Management
- » Transformation and Breakthrough of Securities Firms Advisory

- **With the rise and development of China's wealth management and private banking**  
Since 2008, 15 successful brand summits
- **SHANGHAI, HONG KONG, SINGAPORE.....**  
**90+ Senior Wealth Management Players**



**Features**



## Target Positions

- » Chairman/Secretary General
- » President/Vice President, The General Manager/Deputy General Manager
- » Founder/CEO
- » Partner/ Managing Director
- » Department Head/Director
- » Private Banker
- » CIO
- » CRO
- » CTO

**08:50**

**Opening Remarks**

**Session I : The Changes in the New Era of Wealth Management**

**09:00**

**2020 APAC Wealth Management Outlook**

- > The trends of private wealth management in Asia
- > The opportunities and challenges in the evolving regulatory market
- > New drivers of further competition in wealth management

**Jeff Ryan, Managing Director, UBS**

**09:30**

**The New Pattern under the Rise of Banking Wealth Management Companies**

- > Strategic positioning of banking wealth management company
- > Opportunities for banking wealth management with industrial cooperation
- > Possible scenario for banking wealth management after the transition period of the new asset management regulations

**TU Hong, Chairman, BOCOM Wealth Management Co., Ltd**

**10:00**

**Coffee Break & Networking**

**10:30**

**How to Stand Out in the Global Market during the Gear Shift Stage**

- > Business model evolving from scale to quality
- > The integration of wealth management and asset management
- > Fintech improve the capacity and capability

**Jennifer Zeng, Partner, Bain & Company**

**11:00**

**Panel Discussion: New Era, New Changes and Sustainable Development in Wealth Management**

- > The challenges of service capacity and professional system construction
- > The impact of Fintech on operational efficiency
- > How to strengthen cost management and enhance competitiveness

**Julie Koo, Managing Director, Citi Private Bank**

**Jason Huang, Managing Director of Wealth Management, Schroders**

**Pathik Gupta, Asia-Pacific Head of Wealth Management, Mclagan and Scorio Partnership**

**Kenny Lam, CEO and Head of Asia Pacific, Two Sigma Asia Pacific Limited**

**11:30**

**Open Slot: Strategic Value and Investment Outlook of Global Asset Allocation**

- > Personalized asset allocation planning for HNW clients
- > Dynamic asset allocation with risk management
- > Asset allocation strategy and investment opportunity

**12:00**

**Golden Plume Award Annual Ceremony & Luncheon**

**Session II: High Quality Transformation of Private Banking**

14:00

**[Supply Side Reform] of Chinese Private Banking**

- > How is the private banking offering in china developing
- > The business logic of supply side reform of private banking
- > The key ability of differentiated competition

**ZHANG Xiaodong, General Manager of Private Banking Dept., Industrial and Commercial Bank of China**

14:30

**Open Slot: Risk Management across the Cycle to Protect the Wealth**

- > The challenges of risk management under strict regulation
- > The key to improving risk management ability
- > Application and practice of intelligent risk management

15:00

**Professional Asset Allocation—New Requirements for Private Bank' s Core Capabilities**

- > The expectations of customers called qualified investors evolving
- > Product selling-Marketing services-Asset Management
- > The development of discretionary and advisory portfolio management

**LI Guofeng, General Manager of Private Banking Dept., China Citic Bank**

15:30

**Coffee Break & Networking**

16:00

**The Dilemmas and Solutions of Digital Wealth Management of Private Banking**

- > The ultimate customer experience: client centricity in digital wealth management
- > Practice and inspiration of digital private banking
- > Management methodology of digital transformation

**WANG Hua, Director of Retail Banking | President of Private Banking and Wealth Management Dept., Ping An Bank**

16:30

**Panel Discussion: On the New Starting Line, the Breakthrough of Private Banking**

- > How is the private banking offering in china developing under new asset management regulations?
- > How to highlight "exclusive" in integrated services?
- > Weaknesses and solutions in the transition to active management
- > Cultivation and motivation of private bankers

**GUI Zefa, Vice President of Private Banking Dept., Bank of Communications**  
**LIU Daobai, General Manager Assistant of Private Banking Dept., Industrial Bank Co., Ltd**

**FENG Yi, General Manager of Private Banking Dept., China Construction Bank Shanghai Branch**  
**Lance Li, Head of Product and Investment Consultant of Private Banking Dept., Shanghai Pudong Development Bank**

17:00

**End of Day One**

**Session III: The Best Practices of Family Wealth Succession**

09:00

**The Deep Thought of Family Wealth Succession in the New Era**

- > Having wealth succession planning under transparent taxes
- > Recommended tools of strategic asset allocation
- > What do “real” FO do in the wealthy family ecosystem?

**Woon Shiu Lee, Managing Director, Regional Head of Wealth Planning Family Office & Insurance Solutions, DBS**

09:30

**Open Slot: Overseas Investment in the Globalizing of Tax**

- > What trends are we seeing in overseas asset allocation of Chinese newly rich?
- > How to cope with the challenges and risks in the globalization taxation?
- > The hot issues and latest trends of overseas investment

10:00

**How is the Family Trust offering in China Developing after the Release of Trust Rules**

- > The top design of Family asset allocation and investment management
- > How to have a clear view of the assets prospects
- > How to select the excellent global investors

**CHEN Qiao, Vice General Manager of Wealth Management Dept., CITIC Trust**

10:30

**Coffee Break & Networking**

11:00

**Constructing Family Global Investment System in Complex Market**

- > The top design of Family asset allocation and investment management
- > How to have a clear view of the assets prospects
- > How to select the excellent global investors

**Bruce Kang, Managing Director | General Manager of Xinhu Family Office, Xinhu Wealth Management Co., Ltd**

11:30

**Panel Discussion: the Overseas Experiences & Chinese Practice in Intergenerational Wealth Succession**

- > The difficulties and challenges between family firm governance and wealth inheritance
- > How to coordinate family mission with family firm strategic plan
- > Asset management-Capital management, What’s the role of FO?

**Woon Shiu Lee, Managing Director, Regional Head of Wealth Planning Family Office & Insurance Solutions, DBS**

**Inder Wadhwa, Director ,LGT**

**Jaydee Lin, COO & Managing Partner, Raffles Family Office**

**YU Jun, General Manager of Family Office, Hang Tang Wealth**

**XIAO Sa, Head of Global Family Office, CICC**

12:00

**Luncheon**

**Session IV: Professional Achieved Excellence**

**14:00**

**AI & Digital, the New Milestone of Wealth Management Industry**

- > From internet to intelligence, what's the role today of wealth management organizations
- > How to establish a complete robo-advisor system
- > Cooperation between financial organizations and digital-platform

**Oliver Chiu, Chief Economist, NEO CAPITAL**

**14:30**

**Panel Discussion: Grasping the Long-term Trend to Win the New Future of Wealth Management**

- > Active risk control and management under the strict regulation
- > Client-centered comprehensive financial service model
- > Opportunities and challenges of the wealth succession
- > The dilemmas and solutions in the internationalization process

**David (P) Wilson, SVP | Senior Director, United Overseas Bank(UOB)**

**Martin Ma, Vice-General Manager, Noah Private Wealth Management**

**SHANG Xiao, Senior Vice President, CreditEase**

**15:15**

**Coffee Break & Networking**

**15:45**

**Based on Professional, Transformation and Breakthrough of Securities Firm's Investment Business**

- > Securities industry wealth management transformation and advisor construction
- > The trends of securities firms asset management models evolving
- > The prospects and challenges of "Internet + Digitalization advisory"

**ZHAO Yao, Head of Comprehensive Business of Wealth Management Committee, CITIC Securities**

**16:15**

**Panel Discussion: How will the Securities Firms Developing when Banking wealth management evolving?**

- > What's the potential for securities firms under the competition and synergy between banking wealth management companies and retail banking
- > How to enhance the core competence of investment and research?
- > How to cultivate an investment advisory team with both capability and customer resources?
- > How do you seek investment solutions specialists in the process of China's Opening-up?

**Toshiyasu IYAMA, Chairman of China Committee | Executive VP, Nomura**

**JIANG Mingzhe, Head of Private Banking and Wealth Management Dept., China Merchants Securities**

**LI Keke, General Manager of Wealth Management Dept., Guotai Junan Securities**

**FU Zhu, General Manager of Asset Management Dept., GF Securities**

**17:00**

**Summit End**

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14:30



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17:00 会议

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# Past Key Speakers



**Guangping ZHANG**  
Deputy Director  
CBRC Shanghai Office



**Jian MA**  
General Manager of Private  
Banking Department  
INDUSTRIAL AND COMMERCIAL  
BANK OF CHINA (ICBC)



**Xianjun HUANG**  
General Manager of Private  
Banking Department  
China Construction Bank (CCB)



**Ning SUN**  
President of Private Banking  
Department  
AGRICULTURAL BANK OF  
CHINA (ABC)



**Jing WANG**  
General Manager of Private  
Banking Department  
China Merchants Bank



**Chaohui LI**  
General Manager of Private  
Banking Department  
Bank of Communications  
(BOCOM)



**Zefa GUI**  
Vice President of Private Banking  
Centre  
Bank of Communications  
(BOCOM)



**Guofeng LI**  
General Manager of Private  
Banking Department of Head  
Office  
CHINA CITIC BANK



**Wei FAN**  
General Manager of Private  
Banking Department  
CHINA EVERBRIGHT BANK



**Gang HE**  
DGM of Private Banking  
Department  
SHANGHAI PUDONG DEVEL.  
BANK



**Caiyun LU**  
Head of Wealth Management in  
Greater China  
United Bank of Switzerland (UBS)



**Jeffrey YAP**  
Managing Director  
HSBC Private Banking



**Chaofeng KANG**  
Vice President/Head of  
FO/Director of XIN HU WEALTH  
The Q Club



**Run HU**  
Chairman & Chief Researcher  
HURUN REPORT



**Xixuan BAO**  
Managing Director of Wealth  
Management Department  
FOUNDER SECURITIES



**Feng LI**  
Deputy Director  
China Insurance Regulatory  
Commission  
Shanghai Bureau



**Jun ZHANG**  
Executive Director/Chief  
Economist & Head of Research  
MORGAN STANLEY HUAXIN  
SECURITIES



**Alex ZHANG**  
Deputy Head of Private  
Banking Division  
China Construction  
Bank (Asia)



**Cecilia SHUM**  
Executive Director  
Head of Greater China &  
North Asia  
Bank of Singapore



**Ying TAN**  
President, General Manager  
Russell Investment  
Management (Shanghai) Co. Ltd



**Danny HE**  
Managing Director  
General Manager  
BNP Paribas Overseas  
Investment Fund Management  
(Shanghai) Co., Ltd



**Ting GAO**  
Responsible Officer, CMO | CEO  
China Merchants Asset  
Management (Hong Kong) Co., Ltd  
Foresea China Merchants Equity Investment  
Management (Shenzhen) Co., Ltd



**Joshua XIANG**  
CTO | Senior Vice President  
Technology Committee  
Executive Director  
CreditEase



**Ronald FUNG**  
Chief Digital Officer (CDO)  
NOAH HOLDINGS



**Jeff LI**  
Chief Product Officer  
Lufax Holding Ltd