Agenda

116 Pall Mall, London

OMFIF will create a high-profile one-day event in London in June 2022 where private bankers and ultra-high-net-worth clients come together to discuss best practice in global wealth management and make the most of the opportunities their clients' wealth presents.

The discussions will focus on core issues, such as generational transfer, building the best infrastructure for managing wealth, adopting sustainable approaches to investment and learning about the opportunities created by the digital transformation of financial services.

Clients in attendance will benefit from the expertise of leading practitioners and from the experience of some of Europe's leading families and their family offices, while also learning about fundamental investment trends from eminent personalities from OMFIF's global investment network.

Confirmed speakers

Sir Vince Cable, former Secretary of State for Business, Innovation and Skills

Kristina Church, Head of Responsible Investment Strategy, BNY Mellon Investment Management

Antonio Curia, Executive Director, Wimmer Family Office & Wimmer Financial LLP

Marjan Delatinne, Managing Director, Payments, SETL

Lord Meghnad Desai, Member of the British House of Lords

Alexandre Gartner, Private Bank Head, Bradesco Europa

Elliot Hentov, Head of Macro Policy Research, State Street Global Advisors

Clive Horwood, Deputy CEO and Managing Editor, OMFIF

Du Jun, Co-Founder, Huobi Group

Lord Norman Lamont, former Conservative member of the UK House of Lords and former Chancellor of the Exchequer

Emma McGarthy, Head of the Sustainable Policy Institute, OMFIF

John Orchard, CEO, OMFIF

Grant Parkinson, Head of Consumer, Private and Business Banking for Europe, Standard Chartered

Hans-Joerg Rudloff, Chairman, Marcuard Holding

Manish Singh, Chief Investment Officer, Crossbridge Capital

Anna Stupnytska, Global Macro Economist, Fidelity

Viola Werner, Head of Global Next Generation & Families, Credit Suisse

Neil Williams, Chief Economist, OMFIF

Lily Zhu, Managing Director, Global Wealth Management & Head of Asia, OMFIF

Tuesday 14 June, 2022

09:00

OMFIF Welcome

John Orchard, CEO, OMFIF

Lord Norman Lamont, former Conservative member of the UK House of Lords and former Chancellor of the Exchequer

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09:10-09:30

Opening keynote address

Family wealth as a force for good

This opening keynote will come from a leading figure in the world of investment and policy, highlighting UHNWIs' potential to effect positive change through the power of investment

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09:30-10:20

Panel discussion 1:

A wealth of experience: understanding the economic world we live in today

This panel of forefront leaders will share their insights into global macroeconomic trends which are impacting UHNWI's portfolios, including the outlook for inflation, geopolitical risks and the post-pandemic recovery:

- Exploring how Family Offices and their clients are addressing the actual economic environment
- Analysing how the after-effects of the pandemic and the geopolitics of fragmentation create a regime change in the macro backdrop for today's investors
- Gaining insight on the coming decade and the challenges facing investors

Speakers

Sir Vince Cable, former Secretary of State for Business, Innovation and Skills

Antonio Curia, Executive Director, Wimmer Family Office & Wimmer Financial LLP

Lord Meghnad Desai, Member of the British House of Lords

Elliot Hentov, Head of Macro Policy Research, State Street Global Advisors

Moderator

Neil Williams, Chief Economist, OMFIF

10:20-10:40

Refreshments and networking break

10:40-11:05

Keynote presentation and interview

Future of money

One of Asia's most dynamic and influential blockchain entrepreneurs will explore how crypto assets are on the cusp of transforming the way that UHNWIs invest. In addition, he will share his experience in managing and utilising the wealth his business has generated.

Speaker

Du Jun, Co-Founder, Huobi Group

Moderator

Clive Horwood, Deputy CEO and Managing Editor, OMFIF

11:05-11:55

Panel discussion 2

What every UHNWI should know

Hear from the heads of the world's leading wealth managers about all the key strategic issues facing their most important clients, from next generation transfer to investing in sustainable assets and private markets, and embracing new digital technology in financial services.

Moderator

Clive Horwood, Deputy CEO and Managing Editor, OMFIF

11:55-12:45

Panel discussion 3

Today's NextGens are tomorrow's ultras

Over the next 10-15 years, the NextGen segment will become the influential driver of growth in wealth management. This panel will bring together next generation family members with top family office advisers to discuss their needs, desires and challenges. What do they want from their relationship managers? How do they feel about new types of investment, such as ESG and digital assets? And how can their advisers make sure they don't treat them like they treat their parents?

Moderator

Viola Werner, Head of Global Next Generation & Families, Credit Suisse

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12:45-14:00

Networking lunch

14:00-14:20

Keynote interview

Managing wealth through the generations

A leading European family will discuss with the audience how they have managed through numerous generational transfers, maintaining their wealth, business power and influence.

Speaker

Hans-Joerg Rudloff, Chairman, Marcuard Holding

Moderator

Lily Zhu, Managing Director, Global Wealth Management & Head of Asia, OMFIF

14:20-15:10

Panel discussion 4

How a digital world will affect your wealth

The rise of digital assets and technology could transform global financial markets and blockchain technology could offer new ways for wealth managers to invest in private markets and alternative assets in safe and efficient ways. Experts in digitalisation will explain the opportunities that wealthy clients and their advisers can expect as these markets develop and mature:

- Examining the path towards institutionalisation of digital assets
- Reviewing the Regulated Liability Network and the future of digital money

Marjan Delatinne, Managing Director, Payments, SETL

15:10-15:50

Panel discussion 5

Pioneers in sustainable investment

UHNWIs are more and more looking to increase their investments in sustainable assets, especially among the next generation. But they - and their advisers and managers - are hampered by the lack of quantitative and outcome-oriented data. This fireside chat will bring two pioneers in the field of sustainable investment from some of the world's biggest asset owners to share their approach to sustainable investing with our audience of UHNWIs:

- Regulatory and policy requirements in the sustainable investing space and how that is driving demand from different types of clients
- Value vs. values and how clients should think about future returns from their assets
- Geographical differences – sustainable investing trends in Europe vs. Asia vs. US
- How the macro backdrop has impacted sustainable investing, including the cost of living, Ukraine/Russia, the energy crisis and the impact of COVID

Speakers

Kristina Church, Head of Responsible Investment Strategy, BNY Mellon Investment Management

Anna Stupnytska, Global Macro Economist, Fidelity

Moderator

Emma McGarthy, Head of the Sustainable Policy Institute, OMFIF

15:50-16:10

Refreshments and networking break

16:10-16:30

Keynote interview

Why private markets are key for private investors

Many UHNWIs are now taking a direct approach to investing in private assets. How can these investors ensure they leverage networks to get access to the best opportunities? And what challenges do this type of investment bring? A leading global wealth management head will discuss.

16:30-17:10

Panel discussion 6

New centres of wealth: in and out-bound opportunities

Fast-growing emerging economies are the next centres for the wealth management industry, both in terms of local clients looking to expand their global portfolios and investment potential for UHNWIs based in developed markets. This panel will bring together a group of wealth managers representing emerging countries to discuss these opportunities and what their clients need to know.

Speakers

Alexandre Gartner, Private Bank Head, Bradesco Europa

Grant Parkinson, Head of Consumer, Private and Business Banking for Europe, Standard Chartered

Manish Singh, Chief Investment Officer, Crossbridge Capital

Moderator

Clive Horwood, Deputy CEO and Managing Editor, OMFIF

17:10-17:20

Closing remarks

Clive Horwood, Deputy CEO and Managing Editor, OMFIF

For further information, please contact Monica Ansary on Monica.Ansary@omfif.org