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.

Keynote Speakers

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

Lord Meghnad Desai, Member of the British House of Lords

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

Tim O'Hara, Co-Head of the Rockefeller Global Family Office, President of the Family Office, Rockefeller Capital Management

Philippe Rudloff, CEO, Atlantis Marcuard

Du Jun, Co-Founder, Huobi Group

Bo Ji, Assistant Dean and Chief Representative of Europe, Cheung Kong Graduate School of Business (CKGSB)

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

Louise Huterstein, CEO, Solo Holdings AG & Senior Advisor to the YIO

Hayley Mole, Vice President, Flat World Partners & YIO President

Headline Speakers

Helen Avery, Director of Nature Programmes and GFI Hive, Green Finance Institute

Boris Bohrer-Bilowitzki, Chief Revenue Officer, Copper

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

Stefan Edelmann, Executive Director Asset Management, Sygnum Bank

Alexandre Gartner, Private Bank Head, Bradesco Europa

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

Tim Jones, Executive Director, Tata Limited

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

Maya Prabhu, Managing Director and Head of Wealth Advisory, EMEA, J.P. Morgan Private Bank

Manish Singh, Chief Investment Officer, Crossbridge Capital

Anna Stupnytska, Global Macro Economist, Solutions and Multi Asset, Fidelity

Olivier Trémeaud, Group Head of Wealth Solutions, Edmond de Rothschild

Victor Wang, EMEA Head of Asia Coverage and Connectivity, HSBC Private Banking

Tuesday 14 June, 2022

09:00-09:05

OMFIF welcome

Lily Zhu, Managing Director, Global Wealth Strategy Institute and Head of Asia, OMFIF

09:05-09:20

Opening remarks

John Orchard, CEO, OMFIF

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

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09:20-09:45

Opening keynote address

Family wealth as a force for good

- Historical perspective of the Rockefeller Family Office
- Foundational pillars established to provide comprehensive advice and services across generations
- Engaging Next Gen family members
- Integrating ESG into portfolios
- Recent Client Survey results: top three services in demand (one of which is Financial Education that I can speak to)
- Lessons learned perspective

Speaker

Tim O'Hara, Co-Head of the Rockefeller Global Family Office, President of the Family Office, Rockefeller Capital Management

Moderator

Clive Horwood, Deputy CEO and Managing Editor, OMFIF

09:45-10:35

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
- Shining a light 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

10:35-10:55

Refreshments and networking break

10:55-11:20

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

11:20-11:55

Fireside chat

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:

- Developing family governance and communication strategies
- Providing next generation engagement and development
- Establishing family offices and crafting effective and rewarding philanthropy strategies

Speakers

Maya Prabhu, Managing Director and Head of Wealth Advisory, EMEA, J.P. Morgan Private Bank

Olivier Trémeaud, Group Head of Wealth Solutions, Edmond de Rothschild

Moderator

Clive Horwood, Deputy CEO and Managing Editor, OMFIF

11:55-12:45

Panel discussion 2

Are today's NextGen the disruptors of tomorrow?

Over the next 10-15 years, the Next Generation – set to inherit a record amount across the globe – is set to become the driving force in wealth management. This, in turn, will mean a tectonic shift in expectations and demands on both banks and wealth managers.

This panel will discuss with two Next Generation family members their different demands, desires and needs compared to their parents, which will have an impact on the companies and wealth they inherit.

What visions does the Next Gen have for the financial industry? How are they contributing to reach this new vision? What is their view on new types of investments, such as ESG and digital assets? And are wealth managers ready to cope with the disruptive force of the Next Gen?

Speakers

Louise Huterstein, CEO, Solo Holdings AG & Senior Advisor to the YIO

Hayley Mole, Vice President, Flat World Partners & YIO President

Moderator

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

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12:45-14:00

Networking lunch

14:00-14:20

Keynote interview

Preserving multigenerational wealth over three centuries

A leading European family discusses how a boutique family office has served the needs of many generations of clients.

Speaker

Philippe Rudloff, CEO, Atlantis Marcuard

Moderator

Lily Zhu, Managing Director, Global Wealth Strategy Institute and Head of Asia, OMFIF

14:20-15:10

Panel discussion 3

How a digital world will affect your wealth: Unleashing the full potential of blockchain, NFTs and Web 3

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:

- Debating whether uncollateralised assets are highly unlikely to ever be anything other than an economic sideshow
- The world of crypto, blockchain, Initial Coin Offerings and DEFI - Wave of the future or hyperbole, smoke and mirrors?
- Over the decades, how has the failure of Central Banks to maximise use of digital cash created the vacuum that crypto, blockchain, Initial Coin Offerings and DEFI have come to fill?
- Exploring the main reasons to invest in crypto assets and how can they be integrated in a traditional investment portfolio
- What investment outcomes can be targeted with investing in crypto assets?
- Where do we currently see the opportunities and risks for investors in crypto markets?
- Optimising capital efficiency and minimising counterparty risk of digital asset trading
- Examining the path towards institutionalisation of digital assets
- Reviewing the Regulated Liability Network and the future of digital money

Speakers

Boris Bohrer-Bilowitzki, Chief Revenue Officer, Copper

Marjan Delatinne, Managing Director, Payments, SETL

Stefan Edelmann, Executive Director Asset Management, Sygnum Bank

Tim Jones, Executive Director, Tata Limited

Moderator

John Orchard, CEO, OMFIF

15:10-15:50

Panel discussion 4

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
- Highlighting significant, differentiated impacts on long-term risk and return projections across different time horizons and geographies
- How the macro backdrop has impacted sustainable investing, including the cost of living, Ukraine/Russia, the energy crisis and the impact of COVID
- Nature in addition to the climate piece (as part of the E of ESG)
- The role of philanthropy in being more catalytic and spurring private investment

Speakers

Helen Avery, Director of Nature Programmes and GFI Hive, Green Finance Institute

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

Anna Stupnytska, Global Macro Economist, Solutions and Multi Asset, Fidelity

Moderator

Emma McGarthy, Head of the Sustainable Policy Institute, OMFIF

15:50-16:10

Refreshments and networking break

16:10-16:35

Keynote speeech

Connecting Asia's NextGen with the rest of the world

Families run 85% of the businesses in Asia. Of the top 750 largest family businesses globally, over 20% are Asia-based, with combined revenue of almost $2 trillion. Influenced by Confucianism, Asia NextGen are taught to remember their roots and filial piety (Xiao). They also learned a lot of western culture and thinking after being educated overseas. They are mixtures with both Eastern and Western values. Growing up in a dramatically different generation from their parents, Asia NextGen have many unique characteristics and needs. This speech will discuss:

- Characteristics of Asia NextGen and comparison with Western NextGen
- Needs of Asia NextGen
- How to connect Asia's NextGen with the rest of the world

Speaker

Bo Ji, Assistant Dean and Chief Representative of Europe, Cheung Kong Graduate School of Business (CKGSB)

16:35-17:15

Panel discussion 5

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:

- Reviewing the needs of different market segments observed in emerging markets, what they are looking for in offshore hubs and ways financial institutions can help advise clients as they establish and develop their offshore presence
- Exploring wealth creation in terms of inbound and outbound investments, diversifying assets, compounding returns, moving into different currencies and preserving wealth
- Uncovering the roles established family offices and wealth managers play in servicing these 'new centres' of wealth
- Opening up a world of opportunities by strengthening the linkage between emerging economies and developed markets

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

Victor Wang, EMEA Head of Asia Coverage and Connectivity, HSBC Private Banking

Moderator

Clive Horwood, Deputy CEO and Managing Editor, OMFIF

17:15-17:25
Closing remarks

Clive Horwood, Deputy CEO and Managing Editor, OMFIF

17:30-19:00

Post conference drinks reception

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