WSI OMFIF Wealth Strategy Institute

GLOBAL WEALTH STRATEGY SUMMIT

Tuesday, 14 June 2022
116 Pall Mall
London

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OVERVIEW

OMFIF is hosting a high-profile, one-day event in London where private bankers, wealth managers, HNWIs and UHNWIs are coming together to discuss best practice in global wealth management and make the most of the opportunities their clients' wealth presents.

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

MEETING AT A GLANCE

14 June 2022

08:00 - 09:00	Registration and refreshments
09:00 - 09:05	OMFIF welcome
09:05 - 09:20	Opening remarks
09:20 - 09:45	Keynote: Family wealth as a force for good
09:45 - 10:35	Panel: A wealth of experience: understanding the economic world we live in today
10:35 - 10:55	Refreshment break
10:55 - 11:20	Keynote: Future of money
11:20 - 11:55	Panel: What every UHNWI should know
11:55 - 12:45	Panel: Are today's NextGen are the disruptors of tomorrow?
12:45 - 14:00	Networking lunch
14:00 - 14:20	Keynote: Preserving multigenerational wealth over three centuries
14:20 - 15:10	Panel: How a digital world will affect your wealth: unleashing the full potential of blockchain, NFTs and Web 3
15:10 - 15:50	Panel: Pioneers in sustainable investment
15:50 - 16:10	Refreshment break
16:10 - 16:35	Keynote: Connecting asia's NextGen with the rest of the world
16:35 - 17:15	Panel: New centres of wealth: in and out-bound opportunities
17:15 - 17:25	Closing remarks

MEETING PROGRAMME

08:00-09:00 REGISTRATION AND REFRESHMENTS

09:00-09:05 OMFIF WELCOME

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

09:05-09:20 OPENING REMAKRS

John Orchard, Chief Executive Officer, OMFIF
Lord Norman Lamont, former Member of the UK House of Lords and former Chancellor of the Exchequer

09:20-09:45 KEYNOTE: FAMILY WEALTH AS A FORCE FOR GOOD

Topics include:

- Historical perspective of the Rockefeller family office
- Foundational pillars for providing comprehensive advice and services across generations
- Engaging next generation family members
- Integrating ESG into portfolios
- Recent client survey results: top three services in demand
- Lessons learned

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

Moderator:
Clive Horwood, Managing Editor and Deputy Chief Executive Officer, OMFIF

09:45-10:35 PANEL: A WEALTH OF EXPERIENCE: UNDERSTANDING THE ECONOMIC WORLD WE LIVE IN TODAY

This panel of industry leaders shares their insights into global macroeconomic trends that are impacting UHNWIs' portfolios, including the outlook for inflation, geopolitical risks and the post-pandemic recovery. The discussion includes:

- How family offices and their clients are addressing the economic environment
- How the effects of the pandemic and the geopolitics of fragmentation create a regime change in the macro backdrop for today's investors
- Insights 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 and Wimmer Financial
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

MEETING PROGRAMME

10:35-10:55 REFRESHMENT BREAK

10:55-11:20 KEYNOTE: FUTURE OF MONEY

One of Asia's most dynamic and influential blockchain entrepreneurs explores how cryptoassets are on the cusp of transforming the way that UHNWIs invest. He shares his experience in managing and utilising the wealth his business has generated.

Speaker:
Du Jun, Co-Founder, Huobi Group

Moderator:
Clive Horwood, Managing Editor and Deputy Chief Executive Officer, OMFIF

11:20-11:55 PANEL: WHAT EVERY UHNWI SHOULD KNOW

Hear from the world's leading wealth managers about the 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. Themes include:

- 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, JP Morgan Private Bank
Olivier Trémeaud, Group Head of Wealth Solutions, Edmond de Rothschild

Moderator:
Clive Horwood, Managing Editor and Deputy Chief Executive Officer, OMFIF

MEETING PROGRAMME

11:55-12:45 PANEL: 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 will mean a tectonic shift in expectations and demands for both banks and wealth managers.

This panel discusses with two NextGen 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 NextGen 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 this disruptive force?

Speakers:
Louise Huterstein, Chief Executive Officer, Solo Holdings AG; Senior Adviser, Young Investor Organization
Hayley Mole, Vice-President, Flat World Partners; President, Young Investor Organization

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

12:45-14:00 NETWORKING LUNCH

14:00-14:20 KEYNOTE: 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 over three centuries.

Speaker:
Philippe Rudloff, Chief Executive Officer, Atlantis Marcuard

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

MEETING PROGRAMME

14:20-15:10 PANEL: HOW A DIGITAL WORLD WILL AFFECT YOUR WEALTH

The rise of digital assets and technology could transform global financial markets. 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 explain the opportunities that wealthy clients and their advisers can expect as these markets develop and mature. The discussion explores:

- Whether uncollateralised assets are unlikely to ever be anything other than an economic sideshow
- The world of crypto, blockchain, initial coin offerings and decentralised finance – a wave of the future or hyperbole, smoke and mirrors?
- How the failure of central banks to maximise the use of digital cash has created the vacuum that crypto, blockchain, ICO and DeFi have come to fill
- The path towards institutionalisation of digital assets
- 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, Chief Executive Officer, OMFIF

15:10-15:50 PANEL: PIONEERS IN SUSTAINABLE INVESTMENT

UHNWIs are looking to increase their investments in sustainable assets. But they – and their advisers and managers – are hampered by the lack of quantitative and outcome-orientated data. This fireside chat brings two pioneers in the field of sustainable investment from some of the world's biggest asset owners to share their approach to sustainable. It covers:

- Regulatory and policy requirements in the sustainable investing space and how that is driving demand from different types of clients
- Value versus values and how clients should think about future returns from their assets
- 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, Russia's invasion of Ukraine, the energy crisis and the impact of Covid-19
- Nature and the 'E' in ESG
- The role of philanthropy in spurring private investment

Speakers:

Helen Avery, Director, 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

MEETING PROGRAMME

15:50-16:10 REFRESHMENT BREAK

16:10-16:35 KEYNOTE: CONNECTING ASIA'S NEXTGEN WITH THE REST OF THE WORLD

Families run 85% of the businesses in Asia. Of the 750 largest family businesses globally, over 20% are Asia-based, with combined revenue of almost $2tn. Growing up in a dramatically different generation from their parents, Asia's NextGen have been exposed to both eastern and western influences, and have many unique characteristics and needs. Influenced by Confucianism, they are taught to remember their roots and filial piety. This speech discusses:

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

Speaker:

Bo Ji, Assistant Dean and Chief Representative for Europe, Cheung Kong Graduate School of Business

16:35-17:15 PANEL: 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 brings together a group of wealth managers representing emerging countries to discuss these opportunities and what their clients need to know. The discussion:

- Reviews the needs of different market segments in emerging markets, what they are looking for in offshore hubs and how financial institutions can help advise clients as they establish and develop their offshore presence
- Explores wealth creation in terms of inbound and outbound investments, diversifying assets, compounding returns, moving into different currencies and preserving wealth
- Uncovers the roles established family offices and wealth managers play in servicing these new centres of wealth

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, Head of Asia Coverage and Connectivity, Global Private Banking, EMEA, HSBC

Moderator:

Clive Horwood, Deputy Chief Executive Officer and Managing Editor, OMFIF

17:15-17:25 CLOSING REMARKS

Clive Horwood, Deputy Chief Executive Officer and Managing Editor, OMFIF

SPEAKERS

HELEN AVERY, DIRECTOR, NATURE PROGRAMMES AND GFI HIVE, GREEN FINANCE INSTITUTE

Helen Avery is director, nature programmes and GFI Hive at the Green Finance Institute. She oversees the institute's work on mobilising private capital into nature-based solutions and restoration. She also manages and co-hosts the institute's 'Green is the New Finance' podcast series with Ryan Jude as well as the nature-focused podcast 'Financing Nature'.

BORIS BOHRER-BILOWITZKI, CHIEF REVENUE OFFICER, COPPER

Boris Bohrer-Bilowitzki is chief revenue officer at Copper. With more than 15 years' experience in finance on both the buy and sell sides, he has built and leads the company's global sales strategy. He has a background in business development and relationship management in both traditional financial services and fintech.

SIR VINCE CABLE, FORMER SECRETARY OF STATE FOR BUSINESS, INNOVATION AND SKILLS

Vince Cable was appointed Secretary of State for Business, Innovation and Skills in May 2010 and was elected the Liberal Democrat MP for Twickenham. He served in the Liberal Democrat shadow cabinet as spokesman on trade and industry from 1999-2003, and shadow chancellor from 2003-10. He was deputy leader of the Liberal Democrat party from 2006-10 and leader from 2017-19.

KRISTINA CHURCH, HEAD OF RESPONSIBLE INVESTMENT STRATEGY, BNY MELLON INVESTMENT MANAGEMENT

Kristina Church is head of responsible investment strategy at BNY Mellon Investment Management. Previously, she was head of sustainable solutions and, before that, senior investment strategist and deputy head of sustainability at Lombard Odier Investment Managers. Church spent a decade at Barclays Capital, latterly in its sustainable and thematic research team and formerly as head of European automotive equity research.

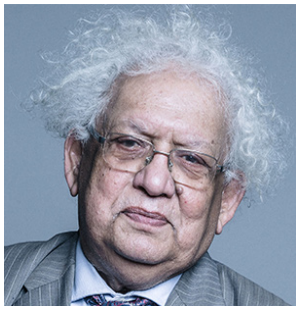
ANTONIO CURIA, EXECUTIVE DIRECTOR, WIMMER FAMILY OFFICE AND WIMMER FINANCIAL

Antonio Curia is executive director of Wimmer Family Office and Wimmer Financial. He is a senior investment banking professional, with over 18 years' experience of cross-border investment activities between the UK, Europe, Latin America and Africa. Curia joined Wimmer Family Office in 2017, in charge of private capital advisory and global macroeconomic research.

SPEAKERS

MARJAN DELATINNE, MANAGING DIRECTOR, PAYMENTS, SETL

Marjan Delatinne is managing director of payments at SETL. She has broad international experience, a deep understanding of business and financial markets and a record of creating and growing highly profitable businesses. She is responsible for the definition and execution of the go-to-market strategy. Previously, Delatinne worked for Ripple as the global head of banking and Swift where she was responsible for the commercialisation of large-scale projects both in securities and payments.



LORD MEGHNAD DESAI, MEMBER, BRITISH HOUSE OF LORDS

Meghnad Desai is chairman of the OMFIF advisory council and emeritus professor of economics at the London School of Economics and Political Science. He has been a member of the UK House of Lords select committee on European Union financial affairs since July 2016.

STEFAN EDELMANN, EXECUTIVE DIRECTOR ASSET MANAGEMENT, SYGNUM BANK

Stefan Edelmann is executive director of asset management at Sygnum Bank. He is responsible for the development of the business regarding new products, client coverage and partnerships. He brings over a decade of experience in investment advisory and business development for global investment firms.

ALEXANDRE GARTNER, PRIVATE BANK HEAD, BRADESCO EUROPA

Alexandre Gartner is private bank head at Banco Bradesco Europa and is part of the authorised management of the bank. Prior to his current role, he was the chief investment officer at Bradesco Private Bank in Brazil overseeing $60bn in client assets and commercial head for ultra-high- and high-net-worth clients.

ELLIOT HENTOV, HEAD OF MACRO POLICY RESEARCH, STATE STREET GLOBAL ADVISORS

Elliot Hentov is head of macro policy research in the global macro team at State Street Global Advisors. He is responsible for research and thought leadership linking policy impulses to financial markets and economics, as well as serving as the company's chief geopolitical strategist. He joined SSGA from Standard and Poor's sovereign ratings group where he was a director and lead analyst for sovereigns and government-related entities in central, eastern and Mediterranean Europe.

SPEAKERS

CLIVE HORWOOD, MANAGING EDITOR AND DEPUTY CHIEF EXECUTIVE OFFICER, OMFIF

Clive Horwood is managing editor and deputy chief executive of OMFIF, where he is responsible for all content and helps set the strategic direction of the company. He joined in November 2020.

BO JI, ASSISTANT DEAN AND CHIEF REPRESENTATIVE FOR EUROPE, CHEUNG KONG GRADUATE SCHOOL OF BUSINESS

Bo Ji is assistant dean of global executive education and chief representative for Europe at the Cheung Kong Graduate School of Business. After his executive career, he founded China Start to bring global start-ups and scale-ups to China. He has taught executive master of business administration and master of business administration programmes at the Massachusetts Institute of Technology, New York University and Hong Kong University of Science and Technology.

TIM JONES, EXECUTIVE DIRECTOR, TATA LIMITED

Tim Jones is executive director of Tata Limited, representing the Tata Group in London. An experienced CEO with specialisms in financial transactions including payment systems, retail banking, institutional stockbroking and pensions, he was previously co-founder of Tibado digital cash and CEO of NEST Pensions in the UK. He also serves as a non-executive director of the Single Financial Guidance Body.

DU JUN, CO-FOUNDER, HUOBI GROUP

Du Jun is co-founder of Huobi Group. He oversees day-to-day operations, investment management and Huobi's incubation platform, Huobi Incubator. He remains actively involved in other investment ventures within the blockchain industry. His earlier career included stints at established technology firms such as Tencent and Kangsheng Creation.

LORD NORMAN LAMONT, FORMER MEMBER OF THE UK HOUSE OF LORDS AND CHANCELLOR OF THE EXCHEQUER

Norman Lamont was UK chancellor of the exchequer from 1990-93 and chief secretary to the Treasury under Prime Minister Margaret Thatcher. He was a member of the House of Commons for 25 years. He was also a minister in the departments of energy, defence and industry.

SPEAKERS

EMMA MCGARTHY, HEAD OF THE SUSTAINABLE POLICY INSTITUTE, OMFIF

Emma is head of the Sustainable Policy Institute. She is responsible for researching trends, developing relationships and programming meetings for the Sustainable Policy Institute. Prior to joining OMFIF, McGarthy worked for several years as a conference producer, developing and running international conferences in the tech, legal and finance sectors, leading on content, research and building key industry relationships. Before this, she was a team leader for a local community development project based in Kenya.

TIM O'HARA, CO-HEAD OF THE ROCKEFELLER GLOBAL FAMILY OFFICE, PRESIDENT OF THE FAMILY OFFICE, ROCKEFELLER CAPITAL MANAGEMENT

Tim O'Hara is president of the family office and co-head of the Rockefeller global family office at Rockefeller Capital Management. He is also a member of the firm's management committee. Prior to joining Rockefeller in 2018, O'Hara was president and chief executive officer of Ayco.

JOHN ORCHARD, CHIEF EXECUTIVE OFFICER, OMFIF

John Orchard is chief executive officer of OMFIF. He chairs OMFIF's executive committee and is a member of the OMFIF board. Up to November 2019, he was a member of Euromoney's management board, having started with the London stock market-quoted global information business in 1994.

GRANT PARKINSON, HEAD OF CONSUMER, PRIVATE AND BUSINESS BANKING, EUROPE, STANDARD CHARTERED

Grant Parkinson is head of consumer, private and business banking for Europe at Standard Chartered. He joined in 2020 as head of private banking for Europe, Middle East and Africa. Based in London, he is responsible for the region's priority and private banking business operations in Jersey, the United Arab Emirates and UK that serve emerging markets clients across Africa, the Middle East, UK and Turkey.

MAYA PRABHU, MANAGING DIRECTOR AND HEAD OF WEALTH ADVISORY, EMEA, JP MORGAN PRIVATE BANK

Maya Prabhu is managing director and head of wealth advisory across the Europe, Middle East and Africa region for JP Morgan Private Bank. Prabhu sits on the EMEA private bank management committee. Prior to joining JP Morgan in 2018, Prabhu worked at Coutts for over 10 years as a specialist adviser.

SPEAKERS

PHILIPPE RUDLOFF, CHIEF EXECUTIVE OFFICER, ATLANTIS MARCUARD

Philippe Rudloff is chief executive officer of Atlantis Marcuard. His private banking career began in 1995 at Merrill Lynch's investment banking operation in New York and Paris. In late 1997, he launched Marcuard Latin America. From 1998-2001, Rudloff worked for Marcuard Cook and Cie as a private banker, joining Bordier and Cie Banquiers Privés in 2001 and rising through the ranks to be a member of the board and managing director.

MANISH SINGH, CHIEF INVESTMENT OFFICER, CROSSBRIDGE CAPITAL

Manish Singh is chief investment officer at Crossbridge Capital in London Previously, he worked at Société Générale and UBS Investment Bank in London and Hong Kong. He has over 18 years' experience in financial markets and global macroeconomics. Apart from investing, his role includes advising the founders and the board at every stage of development – from strategic decisions to network introduction and fundraising.

ANNA STUPNYTSKA, GLOBAL MACRO ECONOMIST, SOLUTIONS AND MULTI ASSET, FIDELITY

Anna Stupnytska is global macro economist at Fidelity International. She leads the production of input to investment teams on globally relevant macroeconomic variables, probability-weighted economic outlooks and macro and policy views across major developed and developing economies. She has been at Fidelity for over six years, starting as global economist and team leader of markets research.

OLIVIER TRÉMEAUD, GROUP HEAD OF WEALTH SOLUTIONS, EDMOND DE ROTHSCHILD

Olivier Trémeaud is group head of wealth solutions, Edmund de Rothschild, which encompasses direct investment solutions, philanthropy and engagement and bespoke solutions. He joined Edmond de Rothschild in 2012 as chief investment officer of the Privaco Family Office and then head of the family advisory department. Between 2014-18, he was head of investment partnerships.

VICTOR WANG, HEAD OF ASIA COVERAGE AND CONNECTIVITY, GLOBAL PRIVATE BANKING, EMEA, HSBC

Victor Wang is the Europe, Middle East and Africa head of Asia coverage and connectivity at HSBC Private Banking. He and his team support Asian ultra-high-net-worth and high-net-worth clients in their wealth management needs in the region. He is a 20-year veteran of HSBC, specialising in international business with various leadership and customer-facing roles in both Europe and Asia.

SPEAKERS

VIOLA WERNER, HEAD, GLOBAL NEXT GENERATION AND FAMILIES DEPARTMENT, CREDIT SUISSE

Viola is a Managing Director at Credit Suisse, were she started 17 years ago and since then served the global bank in leading functions. In 2018, she established a new department to better serve the raising needs of the Next Generation and their Families globally. In 2007, she founded the YIO (Young Investors Organization), a unique network of the next generation of influential families worldwide. She recently launched her second venture outside of Credit Suisse, "The Family Institute".

NEIL WILLIAMS, CHIEF ECONOMIST, OMFIF

Neil Williams is chief economist at OMFIF. He joined in February 2022 to lead economic and financial coverage of sovereign institutions worldwide. He is a veteran central bank watcher who in a 30-year career was most recently chief economist for Hermes Investment Management and senior economic adviser after its merger with Federated.

LILY ZHU, MANAGING DIRECTOR, GLOBAL WEALTH STRATEGY INSTITUTE AND HEAD OF ASIA, OMFIF

Lily Zhu joined OMFIF in October 2021 to launch the Wealth Strategy Institute, to promote best practice for sophisticated private investors, their family offices and their wealth management advisers and engage them in discussions about policy and global finance. Lily is an experienced business leader with a broad and deep understanding of business practice and culture across all regions.

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Welcome Bonus

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