

Independent Wealth Managers in Asia – How do They Define and Refine the Proposition?



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Chair:

» **Adam Reynolds**

APAC CEO
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Panel Members:

» **Oliver Balmelli**

Deputy Chief Executive Officer & Head Private Banking - Singapore
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» **Mauricio Ribeiro**

Partner
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» **Michel Della Libera**

Founder and Chief Executive Officer
OneRock Investments

» **Urs-Peter Oehen**

Founder, Chairman
Expersoft Systems

These are some of the issues discussed by the panel:

- » What is the nature of a sustainable EAM wealth platform? And the challenges of creating a successful and profitable business?
- » How do you manage the increasing complexities and also costs of RMs/advisors, IT expertise, security and compliance?
- » What makes the difference between one EAM or MFO and another, and what do they all offer that is different from the private banks?
- » Do EAMs have the financial and managerial capacity to buy and then handle the latest technologies to modernise and scale their offerings?