Event Summary

The broader wealth management industry is increasingly polarising – those firms making headway seem to either be the largest institutions with scale, or the more focused, niche players.

With a growing number of local and overseas participants in what is a rapidly-shifting Asian wealth management space, differentiation in strategies and value propositions is key to deliver what clients want.

The concept of needs-based conversations with the right clients, backed up by real advice and relevant, contextual information delivered in a blended way between digital and human touch-points, is critical. Yet with the next generation increasingly important – both in size and influence – there is a pressing need to find the right solutions.

Against this backdrop, we have designed today's event is exclusively designed for CEOs, senior management, product gatekeepers and business unit heads across technology, compliance, operations, risk and advisory – from the leading international and local Private Banks, Retail Banks, IFAs, Family Offices, Insurance Companies, and other Independent Wealth Management Firms.

The agenda will address some of the challenging issues you face in terms of developing a profitable business that makes sense in today's environment – via presentations, case studies and panel discussions.