

Independent Wealth Management Forum 2019 Testimonials



At the Hubbis Independent Wealth Management Forum 2019 in Hong Kong on October 22nd, we asked leading industry participants what they thought about our event today.

We hope you enjoy these Testimonials. Click on the [Speakers Name](#) to view their BIO. You can also read the transcripts in this document - and click on Watch Video to view their exclusive interview.

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Who did we ask?

[Kenneth Ho](#)

Managing Partner & Founder
Carret Private Investments

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[Harmen Overdijk](#)

Founding Partner
Capital Company

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[Tariq Dennison](#)

Investment Advisor
GFM Asset Management

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[Philipp Piaze](#)

Partner
Finaport

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[Tim George](#)

Partner
Withers

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[John Ashwood](#)

Managing Director
ZEDRA

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[James Russell](#)

Managing Director, Hong Kong
Equiom Group

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[Damian Hitchen](#)

CEO Singapore
Swissquote

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[Chris Ryan](#)

Chief Executive Officer
Axial Partners

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[Gary Dugan](#)

Chief Executive Officer
Purple Asset Management

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[Aleksy Mironenko](#)

Partner & Chief Distribution Officer
Premia Partners

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[Joshua Rotbart](#)

Managing Partner
J. Rotbart & Co.

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[Joe Alim](#)

Director for Greater China
Cult Wines

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[David Wills](#)

Managing Director
Kenetic

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[Peter Golovsky](#)

Managing Director, Global Head of
Fiduciary Services and Head of Asia
Cone Marshall

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[David Schmid](#)

Global Head of Investment &
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Leonteq Securities

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[Howard Bilton](#)

Chairman
Sovereign Group

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[Suresh Singh](#)

Managing Director, Head of Funds
Distribution - Asia
Principal Global Investors

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[Kenneth Ho](#)
Managing Partner & Founder
Carret Private Investments
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We've been very happy as a firm, and individually, to support Hubbis for well over five years now. So we hope to continue that with these fantastic events.

[Harmen Overdijk](#)
Founding Partner
Capital Company
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As always, it's a very well organised event. Full of industry players. I think all the big independent firms in Hong Kong are present today. So, thank you for organising this event.

[Tariq Dennison](#)
Investment Advisor
GFM Asset Management
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I was hoping today's morning panel would get a little bit more

flared up, because the title itself was a fairly controversial topic. We were saying "is Hong Kong is still relevant?", which I think, you were expecting pies to get thrown, and so on like that. The topic of "What Is The Future Of Hong Kong Wealth Management" is something I think we're overall interested in. But as always, Michael, you do put on quite good events where we get to meet many of our colleagues, and talk about the pressing issues of the day, and what's going to form our industry over the next 10 years.

[Philipp Piaž](#)
Partner
Finaport
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I'm very impressed and surprised. It's a very big turn up. It was 8:30 and a lot of people were there. I was taken by surprise at how quickly it actually started, because most of the people are still outside, and that's why I figured "I'm sure we'll hear of when it

starts inside." But the presence of community members here is pretty impressive. I think in Singapore, we should also try and gather more momentum for this kind of space. I'm very happy to see this in Hong Kong.

[Tim George](#)
Partner
Withers
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I'll tell you, I only arrived just before my speaking slot so I'll be here all afternoon and I'll tell you, but so far it's been great, and a really good turnout, which is good because I think it's important that we support Hong Kong.

[John Ashwood](#)
Managing Director
ZEDRA
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I think it's a credit to you, Michael, and to Hubbis, to pull together such a, as I say, experienced panel of experts, lawyers and trustees to talk about these relevant issues.





[Peter Golovsky](#)
Managing Director, Global Head of Fiduciary Services and Head of Asia
Cone Marshall
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In today's environment, the role of independents in the delivery of financial advice, whether that's from a wealth management, legal, or trustee perspective, is of critical importance. And so, impartiality and objectivity in the delivery of solutions today makes this a preeminent forum in this industry.

[James Russell](#)
Managing Director, Hong Kong
Equiom Group
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It's been a very positive event today. It's a collection of good people from a wide spectrum across the industry, and we've had some really, really useful conversations and I've learned things that I'm going to take back to the office and discuss with my colleagues in more detail. It's always good to meet with people from within your industry and understand what's concerning them; what concerns, challenges, opportunities do they see. It's been a very positive day.

[Damian Hitchen](#)
CEO Singapore
Swissquote
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Today's been a very exciting so far. It's been a great turnout, and as we know there are some concerns about Hong Kong and what's going on politically at the moment. It's a packed house; all the major players are here. There're some very good conversations going on about Hong Kong as the booking center versus other regional booking centers. Obviously being from Singapore, that's an interesting conversation to have. Good mix of people in terms of the audience participants. Actually, interesting there seem to be less of the major custody providers here compared to what I've seen previously. That's obviously an interesting from our point of view. It's been an excellent day so far and I look forward to spending the rest of the day.

[Chris Ryan](#)
Chief Executive Officer
Axial Partners
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We should be doing more of this stuff. It's a really critical time; we have investors who are very



concerned about the future of economies and the future of their portfolio and where yield is going to come from. We should be doing more of this and making sure that we're pushing forward the agenda for the industry.

[David Schmid](#)
Global Head of Investment & Banking Solutions
Leonteq Securities
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It's great to be here. We appreciate a lot that you are organising this event. It's very nice to obviously network, connect with people, be it clients of ours, as well as service providers of the industry, to talk about experiences, knowledge, latest experiences with regards to the financial markets in Hong Kong.

[Gary Dugan](#)
Chief Executive Officer
Purple Asset Management
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As ever, a very engaging conference to attend. Lots of new material. It's always good to see what the industry is saying about different topics as we see things develop, and the challenges we have, from whether it's Donald Trump, through to regulation.

[Aleksey Mironenko](#)

Partner & Chief Distribution Officer

Premia Partners

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A great event, a fantastic participation of multiple independent asset managers; people we haven't met, people we always love to see and do business with, and really exciting conversation about the future of the industry.

[Joshua Rotbart](#)

Managing Partner

J. Rotbart & Co.

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It's great to see that Hong Kong is still very resilient. The industry is still robust. With all the unrest that we experienced in the last few months we, as a Hong Kong company, are happy to see such a large attendance base here today, and that people are genuinely interested to hear what's happening and to seek advice from each other.

[Joe Alim](#)

Director for Greater China

Cult Wines

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Of the panels that I've seen so far, it's been very impartial and objective critique on the current state of wealth management throughout Asia which has been, for me, quite informative. It's

also not working directly in the industry, in a sense of working for an independent wealth manager or asset manager, gaining some more insight into the current challenges within Hong Kong, which is obviously quite topical, and the differences between here and other areas and in Asia.

[David Wills](#)

Managing Director

Kenetic

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Today's been great, especially for us. It's great to see we're the only cryptocurrency-related firm here, so it gives me more excitement and hope that, in the future, we will continue to be the only cryptocurrency firm at such events and carve out a little niche for ourselves.

[Suresh Singh](#)

Managing Director, Head of Funds Distribution - Asia

Principal Global Investors

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Extremely positive. As you know, Hong Kong is still going through a tough period, so I'm really impressed with the turnout that we've had. That's been one of the concerns, as to whether people will come. I mean, you know what it's like in Hong Kong; even Pacific Place is considered a little bit too far from Central. So, I'm very happy with the way it's turned out. ■



Testimonials from the audience

I am very impressed that this event has included several alternative investment ideas that are very interesting and sound, as well as fund houses that are not the BIG fund houses that our clients normally have in their portfolio. These features differentiate your event from other traditional wealth management events held by private banks, and thus provide great value. Thank you!

Overall, a great forum and good investment of my time. The timing of the presentations were good and panel discussions lively.

Great takeaways, namely that there is an opportunity to do more in the space, capitalise on better business models and learn from the better players in the industry. ■

