

# Middle East Wealth Management Forum 2020 Testimonials



**At the Hubbis Middle East Wealth Management Forum 2020 in UAE on January 21th, 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?

## [Ayesha Abbas](#)

VCGM, Head of Priority and Premium Segments  
Standard Chartered Bank

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## [Prashant Tandon](#)

CEO, Managing Director  
Lighthouse Canton

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## [Fadi Barakat](#)

Portfolio Management  
and Advisory

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## [Madhavan Sivashankar](#)

Founder, CEO & Member of The Board of Directors  
Gulf International Finance

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## [Nirav Dinesh Kumar Shah](#)

Founder and Managing Director  
FAME Advisory

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## [Asad Khairi](#)

Regional Head Investment & Insurance, Middle East, North Africa & Turkey  
HSBC Bank

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## [Laurence Black](#)

Regional Director, Client Solutions, EMEA

Asiaciti Trust

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## [Ismael Hajjar](#)

Director, MENA Private Client Services, Family Enterprise, Family Office Advisory  
EY

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## [Vinod Krishnan](#)

Managing Director  
Arch Corporation

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## [Sunita Singh Dalal](#)

Of Counsel  
Stephenson Harwood

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## [Oliver Muggli](#)

Chief Executive Officer, 1291 Private Office  
1291 Group

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## [Deepak Malhotra](#)

Chief Executive Officer  
Mayfair Private

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## [Anand Rai](#)

Presales Lead  
Intellect Design Arena

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## [Martyn Crespel](#)

Director  
PraxisIFM

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**[Ayesha Abbas](#)**  
**VCGM, Head of Priority and Premium Segments**  
**Standard Chartered Bank**  
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I am very excited about the event today. For the first time, after a series of events that I've been attending, I saw a huge turnout from different players in the industry, maybe bankers or regulators or lawyers or asset managers, for that matter. A - the turnout skewed. The diversity of people who are here is fantastic. So very excited to be here and looking forward to come back again.

**[Prashant Tandon](#)**  
**CEO, Managing Director**  
**Lighthouse Canton**  
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I think Hubbis does a great job of organising these networking events. You get to have access to many thought-provoking conversations. You get to meet industry leaders. Of course, share some success stories. And definitely, definitely enjoy the hospitality that Hubbis provides. Thank you so much.

**[Fadi Barakat](#)**  
**Portfolio Management and Advisory**  
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Very good. I really liked your, a bit of element of surprise that came from your questions and the back and forth. Yes, we had a bit of a taste of what the topics might be, but it comes in relevant on the back of the previous discussion on what's been said. It's challenging. It's not like, 'okay, just really, you want to spit out the question and hear the answer' and know what

the discussion is going to be. I thought that that was interesting, and it gives the attendees added value, more insight, and they can hear from the industry experts that are sitting there. A great event, I must say.

**[Madhavan Sivashankar](#)**  
**Founder, CEO & Member of The Board of Directors**  
**Gulf International Finance**  
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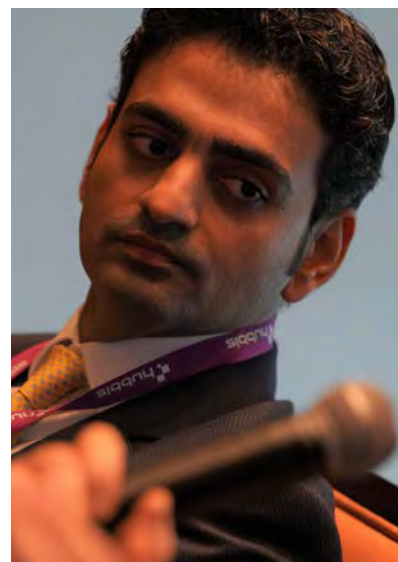
I think this was an amazing experience for me to interact with my peers, to understand the way that they're thinking. I'm glad that forums like this get together and share ideas. I think the audience is also educated with what the panel members have to offer. Overall, well done.

**[Asad Khairi](#)**  
**Regional Head Investment & Insurance, Middle East, North Africa & Turkey**  
**HSBC Bank**  
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No, I think very, very well-arranged. I was impressed with the attendance. Generally, these events, it's very difficult to get a full house. So I think you guys are doing a pretty good job that's why we can see the attendance.

**[Laurence Black](#)**  
**Regional Director, Client Solutions, EMEA**  
**Asiaciti Trust**  
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Always delighted to be part of the Hubbis event globally, not just here in Dubai. And Asiaciti Trust continue to support this because of the quality of our speakers, the



topics, and an extremely well run and attended event.

**[Ismael Hajjar](#)**

**Director, MENA Private Client Services, Family Enterprise, Family Office Advisory**

**EY**

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Overall, the event was really good, really useful. And you've managed clearly to attract a big crowd and very diversified crowd from within the asset management industry and all the service providers that, let's say, provide service to the wealth owners too. So I think the diversity and the quality of the people was very good. I couldn't attend the whole day and listen to all the presentation, but generally, again, there was a consistency in the level of quality of the speakers and the presentation. And I'd say that unlike some of your competitors' event, most of the presentation were not commercial, so people trying to share knowledge and not trying to sell something, which I personally appreciate.

**[Nirav Dinesh Kumar Shah](#)**

**Founder and Managing Director**

**FAME Advisory**

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I'm feeling happy because a lot of neighbours, a set of people are coming in and participating. And of course, on the subject and the content is very, very relevant for today's time. And I must say that because Hubbis been organising it across the centre, they also get quite a bit view of the sector across the locations in which brings a lot of different flavour to the discussions as well, which is very, very important.

**[Vinod Krishnan](#)**

**Managing Director**

**Arch Corporation**

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All good. I think on one side you have the service providers whom you target, but then if you could include some of the larger client base, I know there are the family office conferences that are happening. So one of the initiatives I do, I run a not-for-profit family alliance, and the whole point is for me to encourage families to think of this hard and the soft side of family business or family wealth management.

Increasingly a number of families are looking at, especially the next gen, are looking at ways to establish family offices, but the problem is establishing a single-family office is very expensive. And there's also a trust element and your cooperation element in a family sharing information about themselves amongst the larger groups, so multi-family office becomes a problem. In order to get those barriers broken is when I've started this not-for-profit family alliance where we are able to get together these families, speak to them about the various parts of the soft and the hard sides of wealth

management, encouraged by some of the banks, like JPMorgan, they help me by allowing some of their key professional investment advisors to address these family alliance whenever the time tables coincide. So that's been a big help. But then I think that's the only way to improve participation from the investors or the family offices into events like this. So I think that's something which I'd been wanting to tell you since the year before, but I know it's more focused on service providers.

**[Sunita Singh Dalal](#)**

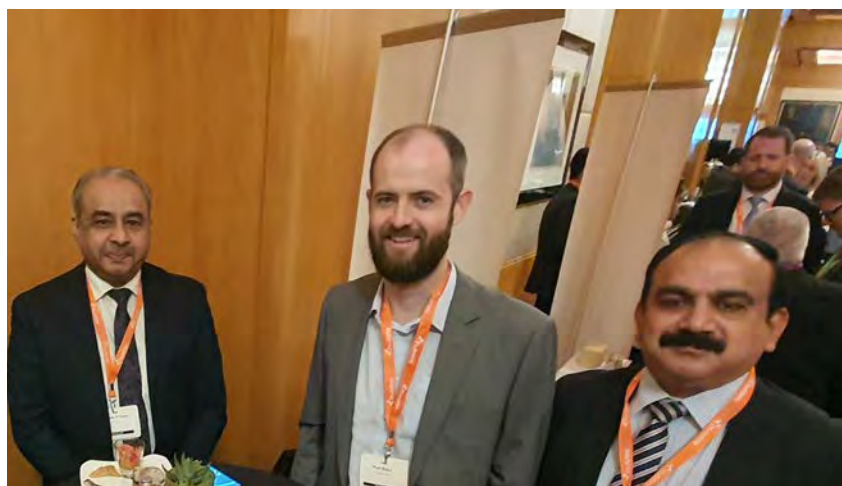
**Of Counsel**

**Stephenson Harwood**

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I think the calibre of speakers at today's event has been exceptional. Without a doubt. It's been very interesting listening to a lot of the speakers. However, I would say that a lot of the speakers are still grappling with archaic stereotypes that we in the region, on the ground, knowing the reality and knowing what solutions are available, do not grapple with because those are indeed archaic and obsolete stereotypes.

So that's something that concerns me quite a bit. And again,





people are not really digging deep enough to understand what does the local GCC family need and advising them on what their needs should be. And that's the whole point of being a trusted advisor is getting into a family, knowing them, understanding them, understanding the dynamics of a family, and then telling them what they should be doing fearlessly. And doing their job independently.

And I think a lot of the panelists that have been here today, those that do fly into the region, haven't still got to grips with that. And that is something that is a very deep-rooted cultural issue. So it's wonderful being polite and very politically correct, but actually you're not doing your clients any justice.

**[Oliver Muggli](#)**

**Chief Executive Officer, 1291 Private Office**

**1291 Group**

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It was very good, very interesting. I especially liked the panel discussions. I think they were extremely well moderated, gave everyone the platform to speak out and mention their opinions. It wasn't product-placing like maybe in some other conferences, so it was a lot of content. I liked also the different, broad range of topics from different speakers. I think it's a very good format and I'm very happy to be a part of it.

**[Deepak Malhotra](#)**

**Chief Executive Officer**

**Mayfair Private**

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The good thing about the event today is you've got people across, although this is the wealth

management type space, you have people from all sorts of backgrounds. You have single-family offices, you have private bankers, you've got people on a more of an advisory capacity, like our organisation. So I think it's quite a mixed group and it's a great forum to share ideas, because people come from a very different background and perspective.

I think the level of networking and interaction has been excellent. And I think there is definitely the theme around the CRS, the substance, was very apparent today as well. So I think there is a gap in knowledge, people do want to learn. This is a great forum for learning, networking and sharing ideas across disciplines.

**[Anand Rai](#)**

**Presales Lead**

**Intellect Design Arena**

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I can see a lot many people who have come here. So I believe the attendees should be 300 plus, if I'm not wrong. I found it to be very exciting to engage with the various people from across GCC. And definitely your business is doing a great job in terms of bringing everyone to the common platform and helping each other to understand how we can help the wealth management industry.

**[Martyn Crespel](#)**

**Director**

**PraxisIFM**

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Seems to be a very good range of interests from people attending from different parts of the world. So for me, that's quite attractive.



# Testimonials from the audience

Never going to miss the Hubbis events. So many intellectuals together at one place. very enlightening and informative - **Priscilla Oliver**

My time at the Middle East Wealth Management Forum was a complete pleasure. I had my reservations with attending this event as I have a busy schedule and I had to postpone my meetings for the next day, but clearly NO regrets. I got to learn so many wonderful facts and ideas on personal and professional enhancement from industry leaders. Looking forward to attending the next event in 2021. I've marked the date in my diary - **Shakir Hussain, Financial Consultant, Petra Insurance Brokers.**

Hubbis did an excellent job in conducting and educating the next generation IFAs. It gives an idea to think optimistic about the market and industry we belong to. Also gave an opportunity to meet senior management people of leading financial organisations. Thanks again and looking forward to being a part of future events, too.

The Hubbis team are committed to producing real content to serve a defined community. I admire and appreciate their efforts. They encourage honest and transparent debate. ■

