

# 2022 Schedule - Hubbis Digital Dialogue Series

## INVESTMENTS

### FIXED INCOME & CREDIT – OPPORTUNITIES AND CHALLENGES FOR THE YEAR AHEAD

Thursday 6<sup>th</sup> January - 3.00pm - 4.00pm HKT / SGT

Exclusive Partner – **Haitong International Asset Management**

### DIGITAL ASSETS AND TOKENISATION – THE GROWING APPEAL TO WEALTH MANAGEMENT CLIENTS

Thursday 27<sup>th</sup> January - 3.00pm - 4.00pm HKT / SGT

Partners – **blufolio, Chintai**

### ESG AND SUSTAINABILITY – REFINING THE PROPOSITION TO ATTRACT ASIA'S HNW CLIENTS

Thursday 17<sup>th</sup> March - 3.00pm - 4.00pm HKT / SGT

Partners – **CSOP Asset Management, GAM Investments**

### EXPANDING ALLOCATION TO PRIVATE ASSETS. WHY? HOW? AND WHAT'S NEXT?

Thursday 7<sup>th</sup> April - 3.00pm - 4.00pm HKT / SGT

Partners – **GAM Investments, TritonLake**

### HOW DO YOU DEAL WITH THE NEW WORLD OF INFLATION?

Thursday 21<sup>st</sup> April - 3.00pm - 4.00pm HKT / SGT

Partners – **GAM Investments, Premia Partner**

### SCALING DPM FOR ASIAN WEALTH MANAGEMENT

Thursday 19<sup>th</sup> May - 3.00pm - 4.00pm HKT / SGT

Partners – **CSOP Asset Management, GMO**

### ALTERNATIVE INVESTMENTS - THEIR RISING PROMINENCE IN ASIA'S HNW PORTFOLIOS

Thursday 16<sup>th</sup> June - 3.00pm - 4.00pm HKT / SGT

Partners – **GAM Investments, GMO**

### ETFs – HOW ARE THEY USED TODAY BY PRIVATE WEALTH MANAGERS IN ASIA?

Thursday 23<sup>rd</sup> June - 3.00pm - 4.00pm HKT / SGT

Partner – **Samsung Asset Management**

### THEMATIC INVESTMENTS – WHAT ARE THE BEST OPTIONS TODAY?

Thursday 14<sup>th</sup> July - 3.00pm - 4.00pm HKT / SGT

Partners – **CSOP Asset Management, GAM Investments**

### DIGITAL ASSET AND TOKENISATION – HOW DO YOU DISCUSS WITH CLIENTS?

Thursday 8<sup>th</sup> September - 3.00pm - 4.00pm HKT / SGT

Partners – **Apollo Capital, Kasa**

### ETFs - USING THEM TO EMBRACE THEMATIC AND ESG OPPORTUNITIES

Thursday 22<sup>nd</sup> September - 3.00pm - 4.00pm HKT / SGT

Partner – **CSOP Asset Management**

### PRIVATE MARKETS AS A SOURCE OF OPPORTUNITY

Thursday 6<sup>th</sup> October - 3.00pm - 4.00pm HKT / SGT

Partners – **TritonLake, Helicap**

### FINDING VALUE IN CHINA – INVESTMENT STRATEGIES FOR THE YEAR AHEAD

Thursday 20<sup>th</sup> October - 3.00pm - 4.00pm HKT / SGT

Partners – **CSOP Asset Management, GAM Investments**

### INCOME - HOW DO YOU GET IT TODAY?

Thursday 10<sup>th</sup> November - 3.00pm - 4.00pm HKT / SGT

Partners – **GAM Investments, CSOP Asset Management**

### FX & PRECIOUS METALS – THEMES AND OPPORTUNISM FOR THE YEAR AHEAD

Thursday 8<sup>th</sup> December - 3.00pm - 4.00pm HKT / SGT

Partner – **J. Rotbart & Co.**

## DIGITAL

### COO LEADERS DISCUSS FUTURE PROOFING THEIR PLATFORMS AND OPERATIONS

Thursday 17<sup>th</sup> February - 3.00pm - 4.00pm HKT / SGT

Exclusive Partner – **Apiax**

### HOW TO ENGAGE CLIENTS IN A MORE IMPACTFUL WAY

Thursday 12<sup>th</sup> May - 3.00pm - 4.00pm HKT / SGT

Partners – **InvestCloud, CREALOGIX**

### IMPROVING BUSINESS PROCESSES AND DRIVING EFFICIENCY

Thursday 26<sup>th</sup> May - 3.00pm - 4.00pm HKT / SGT

Exclusive Partner – **APIAX**

### USING DIGITAL TOOLS TO TRANSFORM AND SCALE YOUR INVESTMENT OFFERING

Thursday 2<sup>nd</sup> June - 3.00pm - 4.00pm HKT / SGT

Partners – **InvestCloud, SS&C Technologies**

### THE NEXT GENERATION OF DIGITAL TOOLS

Thursday 30<sup>th</sup> June - 3.00pm - 4.00pm HKT / SGT

Partners – **InvestCloud, CREALOGIX**

### ENHANCING THE EFFICIENCY OF THE RM

Thursday 28<sup>th</sup> July - 3.00pm - 4.00pm HKT / SGT

Partners – **CREALOGIX, Wealth Dynamix**

## WEALTH PLANNING AND SOLUTIONS

### THE RICH AND TAX – THE PRESSURE IS GROWING AROUND THE WORLD

Thursday 13<sup>th</sup> January - 3.00pm - 4.00pm HKT / SGT  
Exclusive Partner – **Butler Snow**

### WHAT DO WEALTHY ASIAN FAMILIES REALLY THINK ABOUT SUSTAINABILITY AND ESG?

Thursday 10<sup>th</sup> February - 3.00pm - 4.00pm HKT / SGT  
Partners – **Interactive Brokers, Lombard Odier**

### CHINESE HNW CLIENTS – INTERNATIONAL WEALTH MANAGEMENT STRUCTURES AND STRATEGIES

Thursday 24<sup>th</sup> February - 3.00pm - 4.00pm HKT / SGT  
Exclusive Partner – **Trident Trust**

### HONG KONG - STILL AN APPEALING CHOICE FOR UHNW CLIENTS AND FAMILY OFFICES?

Thursday 10<sup>th</sup> March - 3.00pm - 4.00pm HKT / SGT  
Partners – **Henley & Partners, Lombard Odier**

### HNW INSURANCE IN ASIA – TRENDS, MARKET DEVELOPMENTS AND STRATEGIES

Thursday 24<sup>th</sup> March - 3.00pm - 4.00pm HKT / SGT  
Partners – **Lombard International Assurance, Charles Monat Associates**

### RESIDENCY & CITIZENSHIP – TRACKING KEY TRENDS FOR THE REGION'S WEALTHY LOOKING OVERSEAS AND GLOBAL CLIENTS LOOKING TOWARD ASIA

Thursday 5<sup>th</sup> May - 3.00pm - 4.00pm HKT / SGT  
Partners – **Henley & Partners, Utmost Wealth Solutions**

### THE GROWING APPEAL OF PRIVATE PLACEMENT LIFE INSURANCE (PPLI)

Thursday 9<sup>th</sup> June - 3.00pm - 4.00pm HKT / SGT  
Partners – **Lombard International Assurance, 1291**

### UAE AND SINGAPORE – WEALTH STRUCTURING OPPORTUNITIES

Thursday 7<sup>th</sup> July - 3.00pm - 4.00pm HKT / SGT  
Partners – **Henley & Partners, Asiaciti Trust**

### SINGAPORE - THE 'GO-TO' CENTRE FOR ASIAN UHNW FAMILIES

Thursday 1<sup>st</sup> September - 3.00pm - 4.00pm HKT / SGT  
Partners – **Henley & Partners, Trident Trust**

### MAXIMISING THE NEXT GEN OPPORTUNITY

Thursday 15<sup>th</sup> September - 3.00pm - 4.00pm HKT / SGT  
Partners – **Wealth Dymanix, Lombard Odier**

### TOOLS AND STRATEGIES TO SECURE YOUR LEGACY FOR THE NEXT GENERATION

Thursday 27<sup>th</sup> October - 3.00pm - 4.00pm HKT / SGT  
Partners – **Charles Monat Associates, Equiom Group**

### SETTING UP A FAMILY OFFICE

Thursday 24<sup>th</sup> November - 3.00pm - 4.00pm HKT / SGT  
Exclusive Partner – **Trident Trust**

## COUNTRY UPDATES

### INVESTING IN GROWTH & SEEKING VALUE IN ONE OF ASIA'S MOST DYNAMIC ECONOMIES – VIETNAM

Thursday 28<sup>th</sup> April - 3.00pm - 4.00pm HKT / SGT

Exclusive Partner – **Lumen Vietnam Fund**

### MALAYSIAN WEALTH MANAGEMENT UPDATE

Thursday 29<sup>th</sup> September - 3.00pm - 4.00pm HKT / SGT

Partners – **additiv, CREALOGIX**

### INDONESIAN WEALTH MANAGEMENT UPDATE

Thursday 13<sup>th</sup> October - 3.00pm - 4.00pm HKT / SGT

Partners – **additiv, Lombard Odier**

### INDIA – WEALTH MANAGEMENT UPDATE

Thursday 3<sup>rd</sup> November - 3.00pm - 4.00pm HKT / SGT

Partners – **SS&C Eze, EY**

### PHILIPPINES - WEALTH MANAGEMENT UPDATE

Thursday 17<sup>th</sup> November - 3.00pm - 4.00pm HKT / SGT

Partners – **additiv, Lombard Odier**

### THAILAND - WEALTH MANAGEMENT UPDATE

Thursday 1<sup>st</sup> December - 3.00pm - 4.00pm HKT / SGT

Partners – **additiv, Lombard Odier**

## OTHERS

### COMPLIANCE AND REGULATORY WEALTH MANAGEMENT UPDATE

Thursday 20<sup>th</sup> January - 3.00pm - 4.00pm HKT / SGT

Exclusive Partner – **Protiviti**

### INDEPENDENT WEALTH MANAGEMENT FIRMS - GROWTH STRATEGIES

Thursday 3<sup>rd</sup> March - 3.00pm - 4.00pm HKT / SGT

Partners – **Global Mortgage Group, Swissquote**

### HOW CAN YOU IMPROVE CLIENT COMMUNICATION, ENGAGEMENT AND EXPERIENCE?

Thursday 31<sup>st</sup> March - 3.00pm - 4.00pm HKT / SGT

Partners - **Adviscent, Upscale**

### PRIVATE BANKING LEADERS DISCUSS THE VISIONS OF THE FUTURE OF WEALTH MANAGEMENT IN ASIA

Thursday 21<sup>st</sup> July - 3.00pm - 4.00pm HKT / SGT

Exclusive Partner – **InvestCloud**