

# Hubbis Digital Dialogue Series 2021

Thursday 14<sup>th</sup> January

**FAMILY OFFICES IN SINGAPORE – SETTING THEM UP AND OPERATING THEM SUCCESSFULLY**

Exclusive Partner – **Swissquote**

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Thursday 21<sup>st</sup> January

**INVESTMENT OPPORTUNITIES AND CHALLENGES FOR 2021**

Exclusive Partner – **Premia Partners**

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Thursday 28<sup>th</sup> January

**DEVELOPMENTS IN WEALTH PLANNING, STRUCTURING AND FAMILY SUCCESSION IN THE MIDDLE EAST**

Partners – **1291 Group, Henley & Partners**

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Thursday 4<sup>th</sup> February

**CLIENT ENGAGEMENT AND DIGITAL ADVICE**

Partners – **Refinitiv, Finantix**

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Tuesday 23<sup>rd</sup> February

**INDIA – WEALTH MANAGEMENT UPDATE**

Partners – **Refinitiv, Infosys Finacle**

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Thursday 25<sup>th</sup> February

**DIGITAL ASSETS – NOW TOO IMPORTANT TO IGNORE FOR ASIA'S WEALTH MANAGERS?**

Exclusive Partner – **Q9 Capital**

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Thursday 4<sup>th</sup> March

**INDEPENDENT WEALTH MANAGERS - SUSTAINING AND GROWING THE BUSINESS IN 2021 AND BEYOND**

Partners – **Illio, Pershing, a BNY Mellon company**

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Thursday 11<sup>th</sup> March

**ESG – INCREASINGLY EMBRACED BY ASIA'S WEALTHY**

Partners – **Regnan, Aberdeen Standard Investments**

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Tuesday 16<sup>th</sup> March

**MALAYSIA – AN UPDATE ON THE WEALTH MANAGEMENT MARKET'S EVOLUTION**

Partners – **Refinitiv, Comarch**

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Thursday 18<sup>th</sup> March

**CREATING A ROBUST FAMILY SUCCESSION PLAN – INCLUDING TAX AND COMPLIANCE CONSIDERATIONS**

Partners – **Asiaciti Trust, Trident Trust**

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Thursday 25<sup>th</sup> March

**THE GROWING OPPORTUNITY FOR ETFs AND TAILORED ETFs IN PORTFOLIO ALLOCATION**

Partners – **CSOP, Samsung**

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Wednesday 7<sup>th</sup> April

**HOW TECHNOLOGY CAN BE HARNESSSED TO DRIVE SUCCESS IN ASIAN WEALTH MANAGEMENT**

Exclusive Partner – **AZQORE**

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Thursday 8<sup>th</sup> April

**COMPLIANCE AND REGULATORY CHALLENGES IN PRIVATE WEALTH MANAGEMENT FOR 2021**

Partners – **Apiax, SIX**

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Thursday 15<sup>th</sup> April

**HOW TO ENGAGE PROSPECTS AND CLIENTS IN A MORE IMPACTFUL WAY**

Exclusive Partner – **Hubbis**

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Tuesday 20th April

**THE PHILIPPINES – UPDATE & REVIEW OF THE STATUS OF THE WEALTH MANAGEMENT MARKET**

Partners – **Refinitiv, InvestCloud**

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Thursday 22nd April

**USING DIGITAL WEALTH SOLUTIONS TO CURATE THE BEST PORTFOLIOS AND DELIVER ADVICE**

Partners – **InvestCloud, QUO**

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Thursday 29th April

**THE NEW NORMAL REQUIREMENTS OF THE NEXT-GEN CLIENT**

Partners – **Asiaciti Trust, Henley & Partners**

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# Hubbis Digital Dialogue Series 2020

Thursday 14<sup>th</sup> May

**WEALTH MANAGEMENT – WHERE DOES THE INDUSTRY GO FROM HERE?**

Partners – **Swissquote, Henley & Partners, Wealth Dynamix, Allfunds**

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Thursday 21<sup>st</sup> May

**INVESTMENT PRODUCTS AND SOLUTIONS – EXPLORING THE WAY FORWARD**

Partners – **Swissquote, Henley & Partners, Wealth Dynamix, Allfunds**

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Thursday 28<sup>th</sup> May

**THE NEW DIGITAL WORLD: HOW WILL IT AFFECT US ALL?**

Partners – **Swissquote, Henley & Partners, Wealth Dynamix, Allfunds**

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Thursday 4<sup>th</sup> June

**THE DAWN OF A NEW ERA: THE IMPLICATIONS FOR DIGITAL TECHNOLOGY & SOLUTIONS IN WM**

Partners – **Swissquote, additiv, Wealth Dynamix, Allfunds**

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Thursday 11<sup>st</sup> June

### **ASIA'S UNHW COMMUNITY CHOOSING A JURISDICTION FOR LIFE AND WEALTH**

Partners – **Swissquote, Henley & Partners, The Sovereign Group, Rapier Consulting**

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Thursday 18<sup>th</sup> June

### **IN THE POST-PANDEMIC WORLD, WHO WILL WIN THE BATTLE OF THE PLATFORMS?**

Partners – **Swissquote, Allfunds, Saxo Markets, Pershing, a BNY Mellon company**

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Thursday 25<sup>th</sup> June

### **INDIAN WEALTH MANAGEMENT - WHERE DOES THE INDUSTRY GO FROM HERE?**

Exclusive Partner - **Henley & Partners**

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Thursday 2<sup>nd</sup> July

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

Exclusive Partner - **Henley & Partners**

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Thursday 9<sup>th</sup> July

### **THE VITAL FUTURE OF THE RELATIONSHIP MANAGER IN ASIA**

Exclusive Partner – **WDX**

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Thursday 16<sup>th</sup> July

### **INDEPENDENT WEALTH MANAGEMENT FIRMS - GROWTH STRATEGIES**

Exclusive Partner - **Swissquote**

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Thursday 23<sup>rd</sup> July

### **HOW ARE PRIVATE WEALTH MANAGERS USING ETFS TODAY?**

Partners – **iShares by Blackrock, Tradesocio**

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Thursday 30<sup>th</sup> July

### **THAILAND WEALTH MANAGEMENT – WHERE DOES THE INDUSTRY GO FROM HERE?**

Partners – **Swissquote, Henley & Partners, Wealth Dynamix, Allfunds**

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Thursday 6<sup>th</sup> August

### **HNW LIFE INSURANCE - OPPORTUNITIES IN THE POST COVID-19 WORLD**

Partners – **1291 Group, Lombard International Group, Sun Life Financial, Rapier Consulting**

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Thursday 13<sup>rd</sup> August

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

Exclusive Partner – **Premia Partners**

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Thursday 20<sup>th</sup> August

### **LOCAL WEALTH MANAGEMENT – EMBRACING DIGITAL TO IMPROVE THE PROPOSITION**

Partners – **Crealogix, Finantix, QUO, SS&C**

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Thursday 27<sup>th</sup> August

### **KEY DEVELOPMENTS IN VIETNAMESE WEALTH AND ASSET MANAGEMENT**

Partners – **Henley & Partners, Swissquote, Wealth Dynamix, Allfunds**

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Thursday 3<sup>rd</sup> September

### **ALTERNATIVE INVESTMENTS – THEIR ROLE IN THIS NEW INVESTMENT WORLD**

Partners – **J. Rotbart & Co., Pershing, a BNY Mellon company, The Global CIO Office, Wellington Management**

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Thursday 10<sup>th</sup> September

### **MAXIMISING THE NEXT GEN OPPORTUNITY**

Partners – **PraxisIFM, Henley & Partners, The Sovereign Group**

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Thursday 17<sup>th</sup> September

### **INTERNATIONAL AND REGIONAL WEALTH MANAGERS – IMPROVING THEIR DIGITAL PLATFORM AND CAPABILITIES**

Partners – **Finantix, Azqore, QUO**

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Thursday 24<sup>th</sup> September

**INDONESIAN WEALTH MANAGEMENT - OPPORTUNITIES & GREAT CHALLENGES**

Partners – **Comarch, Henley & Partners, Swissquote**

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Thursday 1<sup>st</sup> October

**CONVERTING ASIA'S CLIENTS TO THE LOGIC OF DPM**

Partners – **The Global CIO Office, Premia Partners**

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Thursday 8<sup>th</sup> October

**PRIVATE BANKING HEADS DISCUSS THE VISIONS OF THE FUTURE OF WEALTH MANAGEMENT IN ASIA**

Partners – **Henley & Partners, Swissquote**

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Thursday 15<sup>th</sup> October

**MALAYSIAN WEALTH MANAGEMENT – THE EVOLUTION OF THE MARKET AND THE CHALLENGES AHEAD**

Partners – **Crealogix, Moxtra**

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Thursday 22<sup>nd</sup> October

**THE EVOLVING WORLD OF FINTECH, ROBO, AI, ML, DATA, ANALYTICS & DIGITAL SOLUTIONS**

Partners – **Asset Control, Canopy, Crealogix, SIX, Tradesocio, Comarch**

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Thursday 29<sup>th</sup> October

### **PHILIPPINES WEALTH MANAGEMENT – EVOLUTION OF THE MARKET & KEY TRENDS AHEAD**

Partners – **Henley & Partners, Moxtra, additiv**

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Thursday 5<sup>th</sup> November

### **ESG – ITS GROWING IMPACT AND REACH IN ASIA**

Exclusive Partner – **GMO, Ping An of China Asset Management**

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Thursday 12<sup>th</sup> November

### **WEALTH PLANNING AND STRUCTURING – AN EVOLVING PRIORITY IN ASIAN WEALTH MANAGEMENT**

Partners – **PraxisIFM, Quilter International, ZEDRA**

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Thursday 19<sup>th</sup> November

### **THE EVOLUTION OF WEALTH MANAGEMENT IN THE MIDDLE EAST**

Partners – **Tradesocio, Moxtra, additiv**

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Thursday 26<sup>th</sup> November

### **ASIAN HNW AND UHNW INVESTORS AND THE SEARCH FOR INCOME**

Partners – **Samsung Asset Management, Lyra Capital, CSOP Asset Management, Ping An of China Asset Management (Hong Kong)**

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Thursday 3<sup>rd</sup> December

**CHINESE FAMILIES & WEALTH – OVERCOMING GOVERNANCE & ESTATE PLANNING CHALLENGES**

Partners – IQEQ, PraxisIFM, ZEDRA, Quilter International

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Thursday 10<sup>th</sup> December

**INDEPENDENT WEALTH MANAGERS – EMBRACING DIGITAL TOOLS TO ENHANCE THEIR ADVANTAGE**

Partners – Canopy, Investsuite, Pershing, a BNY Mellon company, QUO, SS&C Eze, Swissquote

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