Indonesia Wealth Management Forum 2018

18 October | Jakarta | Indonesia

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Hubbis is delighted to have hosted our 8th annual Indonesian Wealth Management Forum, which yet again produced an outstanding set of panel discussions, presentations and workshops for the high-level delegates.

The event was attended by more than 240 CEOs, CIOs, senior managers, product/fund gatekeepers and business heads across advisory, compliance, technology and other key areas of wealth management, working at local and international private banks, retail Banks, IFAs, insurance companies, single and multi-family offices, and at other independent wealth management firms.

Indonesia's rapidly growing economy and fast-expanding private wealth continue to present an exciting opportunity in wealth management for domestic and foreign players alike.

The agenda was carefully designed to help delegates appreciate exactly where the wealth management market stands, the opportunities and challenges faced by market participants and new entrants, and what must be achieved in order for the market to expand and also to advance in sophistication.

The delegates achieved great insights from local and overseas wealth management experts who shared their expertise on the market’s development, on best practices, the key components of successful wealth management businesses, and who shared lessons learned from developing wealth management offerings elsewhere in Asia.

A vital element of any emerging wealth management market is the regulatory side, and this was a central area of focus for the event as Indonesia’s regulations and compliance practices are developing apace, albeit perhaps not quite as rapidly or comprehensively as in some other leading Asian economies. Numerous other vital areas were covered throughout the day, including the development of people skills, investment products and concepts, insurance products, the impact of digital technology on the wealth management offering, to name but a few.

The day concluded with many delegates commenting on just how insightful and useful they had found the panels, the presentations, the workshops and the networking opportunities. We now look ahead to our 2019 Indonesia event, where we will continue to build out our expertise and our relationships and connections for this exciting and dynamic market.
Attendee Profile

- 26% Retail/Private Banks
- 18% NBFCs
- 8% Independent Firms
- 14% Asset management
- 10% Technology
- 8% Professional services
- 16% Other

Job role

- C - Level
- Product/ Investment
- Business Head
- Adviser/ Wealth Manager
- Other
Attendees from these firms

1291 Group Asia
360F
Aberdeen Standard Investments
Abhimata Persada
Acuris Risk Intelligence
Agrud Advisors
AIA
Ashmore Investment Management
Asia Globalindo
Asia Trade,ltd
Axial Partners
AZ Investment Management
Bank Central Asia
Bank Mandiri
Bank Negara Indonesia
Batavia Prosperindo Asset Management
BII Maybank
BNI
BNI Asset Management
BNP Paribas
Bunker Group
Butterfield
China Access Wealth Management
Chubb Life Insurance Indonesia
CIMB Niaga
CIMB Private Banking
CIMB-Principal Asset Management
Commerzbank
Commonwealth Bank
Covenant Capital
Crossinvest
Dau & Tuah
DBS Bank
DBS Treasures
DWF Compliance
DWS
Eastspring Investments
EFG Bank
Finansia Consulting
Finantix
Finaport
Global Precious Metals
Golden Equator
Golden Equator Capital
Great Eastern Financial Advisers
Great Eastern Life Assurance
Growth Trade NIV
Handi Putranto Wilamarta Firm
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HSBC Bank
Hubbis
IndoSterling Aset Manajemen
Insight Investment Management
Intellect Design Arena
INTL FCStone
J O Hambro Capital Management
J. Rotbart & Co.
kata.ai
Kolega Capital
Lombard Odier
Mak Management Group
Malca Amit
Mandiri Manajemen Investasi
Manulife Asset Management
Manulife Financial
Maxco Futures
Maybank
Maybank Asset Management
Mercer
Miles Software Solutions
Morningstar
National Chung Hsing University
New Wealth
Noah Holdings
Pan Pacific Insurance
Panin Bank
PB Taxand
Pinnacle Investments
Property Perfect
Prudenta Business Advisory
Prudential Life Assurance
PT Aberdeen Standard Investments
Indonesia
Pt bussan auto finance
PT Limindo Makmur
PT Prudential Life Assurance
PT. Agrodana
Public Notary
Pulau Lima Jaya
Putranto Alliance, Handi Putranto
Wilamarta Firm
Putranto Alliance, Handi putranto
wilamarta firm
Quantic Technovations
Rasyidi Consultant
RHB Asset Management Indonesia
RHTLaw Taylor Wessing
Roland Berger
Schroders Wealth Management
Sequis life
Silversea Asset Management
Sinarmas Asset Management
Sistema Datapilar
Sovereign Group
Sovereign Straits Trust
Sun Life Financial
Syailendra Capital
Teluk Luas
Thomson Reuters
Trimegah Asset Management
Turning Point Capital
UBP
UOB Kay Hian
Vantis Prosperindo Manajemen
Speakers

Antony Dirga
Trimegah Asset Management

Carolyn Leng
CIMB Private Banking

Chris Bendi
Zurich Topas Life

Simon Lints
Schroders Wealth Management

Steven Suryana
BBH

Ranjit Khanna
UBP

Steven Satya Yudha
Ashmore Investment Management

Glant Saputra Hadi
BII Maybank

Olivier Robine
Commerzbank

Laurence Lancaster
Sovereign Group

Daphne Chandra
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Ogar Renaldi Widjaja CFA FRM
DWS

David Fergusson
Global Precious Metals

Loic Pitrou
New Wealth Experience

Ivan Kusuma
Commonwealth Bank

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Key voting poll results

The Hubbis Indonesian Wealth Management Forum 2018 event in Jakarta on August 30th provided fascinating and thought-provoking discussions and talks for the assembled delegates. As usual we also polled the attendees and mined out the following nuggets.

- 54% of our audience think the big wealth management opportunity in Indonesia is onshore
- 91% wish the regulator was more proactive in helping build the wealth management market in Indonesia
- Wealth Structuring was considered the overwhelming opportunity to add value to clients AND make higher earnings
- Only 23% of our audience believe that a relationship manager in wealth management will be replaced by a robot within 5 years
- 89% feel confident that digital will play a significantly more important part in wealth management in Indonesia
- Only 24% of the audience have a will
- 64% regularly have conversations with clients about the next generation
- A huge 88% have clients still TRYING to avoid paying tax they must pay
- 43% of the audience have no interest in Philanthropy
- 96% want to see funds management become more international and diversified
- 89% want to see ETFs develop in Indonesia
- Our audience anticipates that fund penetration will be 20% of a banks clients in ten years
- Only 25% of the audience invest in cryptocurrencies
Indonesian Wealth Management Forum 2019

Thursday 17th October, 2019