

5th Annual
PRIVATE
BANKING Asia 2009

WHERE **ASIA'S LEADING** AND NEW
PRIVATE BANKS GATHER TO ASSESS,
DISCUSS AND DEBATE THEIR THOUGHT
LEADERSHIP, BUSINESS MODELS AND
SUSTAINABLE STRATEGIES IN VOLATILE
TIMES AND MARKETS

ASIAN
FAMILY OFFICE
FORUM 2009

24-27 MARCH
2009

THE RITZ CARLTON
MILLENNIA

SINGAPORE

Nurture. Grow.



FOREWORD

Yesterday's record growth and lavish profits, today's big write downs, sending panic across the globe. As we delve into the current volatile financial markets, can the private banking industry sustain and enjoy another year of steady growth?

The rise of Asia's private banking sector led by unprecedented wealth creation in Asia has witnessed some of the industry's strongest growth rate, putting Asia in the spotlight. Until now, private banking has been one of the more stable sectors within the business. Nonetheless, the recent meltdown from sub-prime woes, along with an array of industry concerns has posed some challenging times ahead even for the best.

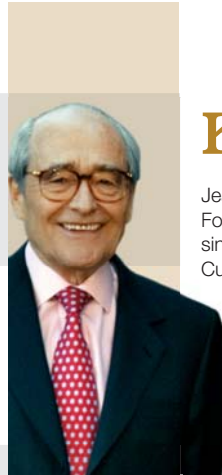
What are the trickle down effects for this industry at a time where stock prices are sluggish? The acute lack of differentiation amongst private banks is another key concern. Coupled with the high cost/incomes ratio, sustainability becomes the focus. Insights into investment psychology and allocation for HNWs - How can wealth managers convince their Asian clients, ardent equities investors to hedge exposure by adopting a well balanced diversified portfolio? Then there is the rapid rise of multi-family office and independent asset managers - do they present opportunity or competition for private banks? Where are the growth areas for Asia's private banks in times of economic uncertainty and aggressive sphere?

Private Banking Asia 2009 goes all out to gather a myriad of the finest thought leaders in the private wealth management business, anchored interactive discourse and debates on comprehensive, imperative topics and relevant issues that matter. This conference offers a veritable smorgasbord of information made privy to those concerned. Often the most relevant are what becomes the most influential.

We are gearing up an exciting week of programmes for your better insights. Get involved. Be part of it!



Valerie Reena Su
Executive Producer
Private Banking Asia



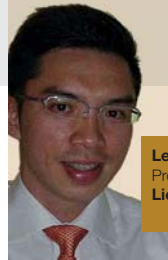
KEYNOTE **Jean Pierre Cuoni** Co-Founder & Chairman EFG Bank

Jean Pierre Cuoni is a Swiss citizen, born in 1937. He is Founder and Chairman of EFG International, a public company since 2005, and of EFG Bank, founded in 1995. Prior to this, Cuoni was Chief Executive of Coutts and Co International and Chief Executive of Handelsbank NatWest, the Swiss subsidiary of NatWest. Beforehand, Mr. Cuoni spent 28 years with Citibank in New York, Paris and Switzerland, and was the Region Head of Private Banking for Europe and Middle East /Africa and Country Corporate Officer for Citibank in Switzerland. Cuoni was Senior Vice President of Citibank and Chairman of Citibank (Switzerland).



Phil Whittaker
Director
Sotheby Institute
of Art

OUR STAIR



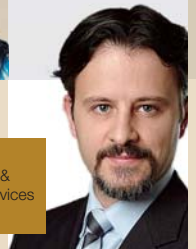
Lee Poh Wah
Programme Director
Lien Foundation



Anthonia Hui
Chief Executive Officer
AL Wealth Partners



S. Khing Go
Chief Executive Officer,
Asia
Schroder & Co



Geoffroy Dedieu
Managing Director &
Head of Family Services
Bank Julius Baer

FOR SPEAKING OPPORTUNITIES! online www.terrappinn.com

Who's Speaking:

PRIVATE BANKS:

- **Claudio Ludlow**, Head of Structured Solutions, Asia, **Barclays Wealth**
- **Julie Teo**, Head of Wealth Planning, Asia, **BNP Paribas Private Bank**
- **Sebastien Mespoulet**, Head of Investments Services, Asia, **BNP Paribas Private Bank**
- **Michael Foo**, Head of Portfolio Management & Research, Asia, **Clariden Leu**
- **Jean Pierre Cuoni**, Co-Founder & Chairman, **EFG Bank**
- **Hou Wey Fook**, Managing Director, Chief Investment Officer, Portfolio Management, Asia, **ING Private Banking**
- **Satya Narayan Bansal**, Chief Executive Officer, India, **Barclays Wealth**
- **Geoffroy Dedieu**, Managing Director & Head of Family Services, **Bank Julius Baer**
- **Dr. Markus Kobler**, Asia COO, **Bank Julius Baer**
- **Dr. V. Anantha-Nageswaran**, Head of Investment Research, Asia & Middle East, **Bank Julius Baer**
- **S. Khing Go**, Chief Executive Officer, Asia, **Schroder & Co**
- **Yeong Phick Fui**, Head of Wealth Management SEA, **UBS Wealth Management**
- **Lim Leong Guan**, Head of Transactional Products, Asia, **UBS Wealth Management**
- **Paul Leo**, Head Investment & Advisory Services, **UOB Group**

INDUSTRY PRACTITIONERS:

- **Anthonia Hui**, CEO, **AL Wealth Partners**
- **Christophe Audergon**, Managing Director, **Crossinvest**
- **Lee Poh Wah**, Programme Director, **Lien Foundation**
- **Willie Cheng**, Author of "Doing Good Well"
- **Phil Whittaker**, Director, **Sotheby Institute of Art**
- **Laurence Lien**, CEO, **NVPC**
- **Tuan Huynh-Huu**, Division Director, Structured Products & Funds, **Macquarie Equities**
- **Brett King**, CEO, **AAFM**
- **Eli Lenyoun**, Director, **Family Wealth Solutions**

FAMILY OFFICE:

- **Lucy Sutro**, Managing Director, **Fleming Family Partners**
- **P. Ming Wong**, Managing Director, **IMC Investments**
- **Prakash Parthasarathy**, Chief Investment Officer, **Premji Invest**
- **Ron Perkinson**, President, **Putera Sampoerna Foundation**
- **Eric Teng**, CEO, **Tan Chin Tuan Foundation**
- **Stephen Riady**, President, **The Lippo Group of Companies**
- **Sunil Dalal**, Managing Director, **Unidel Advisors**



Stephen Riady
President
The Lippo Group of Companies



Willie Cheng
Author of
"Doing Good Well"



Eric Teng
Chief Executive Officer
Tan Chin Tuan Foundation



Tuan Huynh-Huu
Division Director
Macquarie Equities (Asia) Limited



P. Ming Wong
Managing Director
IMC Investments



Michael Foo
Head of Portfolio Management & Research, Asia
Clariden Leu



Hou Wey Fook
Managing Director, Chief Investment Officer, Portfolio Management, Asia
ING Private Banking



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Barclays Wealth



Sebastien Mespoulet
Head of Investments Services, Asia
BNP Paribas Private Bank



Sunil Dalal
Managing Director
Unidel Advisors



Ron Perkinson
President
Putera Sampoerna Foundation



Lucy Sutro
Managing Director
Fleming Family Partners



Eli Lenyoun
Director
Family Wealth Solutions



Dr. Markus Kobler
Asia Chief Operating Officer
Bank Julius Baer

RS

WHAT'S HAPPENING

WEDNESDAY
25 MARCH 2009

CONFERENCE DAY I

THE SIGNIFICANCE OF ASIA IN GLOBAL PRIVATE BANKING

- 08.00 Registration & Breakfast
- 08.45 Chairperson's Welcome Address
- 09.00 **Regulatory Panel:** Globalization of Private Banking - Where will the key hubs emerge?
- 09.45 **Thoughts Leaders League** - Capitalising on the development and growth of Asian Private Banking: Best practices in banking the HNWIs & managing a wealthier Asia
- 10.30 Morning Refreshments

INSIGHTS INTO INVESTMENTS PSYCHOLOGY AND ALLOCATION FOR HNWIS

- 11.00 **Special Address** - Asset allocation and behaviour finance in Wealth Management
- 11.30 **Panel:** Beating the Bear - Constructing a portfolio that delivers higher absolute and total returns with less downside risks for HNWIs Investors



- 12.15 Networking Lunch Reception



TOWARDS MORE SOPHISTICATED PORTFOLIOS: CREATING INNOVATIVE PRODUCTS AND CLIENT-CENTRIC SOLUTIONS FOR HNWIS

- 2.00 **Panel:** Pain or gain - Do structured products work for HNWIs in a bear market?
- 2.45 Assessing arts as an investment
- 3.15 Afternoon Refreshments

STREAM A

FORMULATING WINNING STRATEGIES TOWARDS INCREASING CLIENTS & MARKET SHARE IN COMPETITIVE MARKETS

- 3.45 **Special Case Study:** Designing a global super brand. Lessons learnt from the world's renowned brands
- 4.15 **C Level Think Tank:** Achieving real differentiation: The key to creating superior brand excellence and leadership
- 5.00 **Panel:** The holy grail of the trusted advisors towards building market share

STREAM B:

NEXT GENERATION WEALTH TRANSFER - FROM WEALTH ACCUMULATION TO WEALTH PRESERVATION & WEALTH TRANSFER

- 3.45 **Panel:** What role should Private Banks have in the facilitation of philanthropy?
- 4.30 Case Study: Igniting philanthropy 2.0
- 5.00 Family affairs: Surviving inter-generational wealth transfer



FOR MORE INFORMATION! online www.terrapiinn.com/2009/pbasg |

THURSDAY
26 MARCH 2009

CONFERENCE DAY II

CRYSTAL BALL: CHARTERING GROWTH & SUSTANABILITY

- 8.00 Registration & Breakfast
- 8.45 Chairperson's Opening Address
- 9.00 **Keynote Address:** Future prospects for global Private Banking
- 9.30 **Special Address:** Women & wealth - Targeting women in Private Banking
- 10.00 Morning Refreshments

CREATING NEW OPPORTUNITIES FROM ALTERNATIVE DISTRIBUTION

- 10.30 **Panel:** The rise of the Multi Family Office - Friend or foe
- 11.15 **Panel:** In conversation - The future of Independent Asset Managers in Asia
- 12.00 U Turn – Executive Round Table Exchange
This is your opportunity to pick a compelling topic and/or speaker of your choice. In an interactive and discussion format, the speaker/topic leader would lead the topic subject with contribution and Q&A from the audiences.
Topic 1: Tax Havens
Topic 2: Building trust and fiduciary services in a changing world
Topic 3: Valued Based Investing - SRI as an asset class
Topic 4: Structured Products
Topic 5: Insurance - An Essential Wealth Management Tool
Topic 6: ETF & indexing investments

- 12.30 Networking Lunch Reception

THE GOLDEN ALLURE - INSIGHTS AT OPPORTUNITIES & TRENDS IN EMERGING AND HIGH GROWTH MARKETS

- 2.30 **Panel:** Capitalizing on the upward momentum of India's billionaires and growing demands for sophisticated investments solutions
- 3.15 **Panel:** Zooming into the opportunities of China's private wealth and competitive landscape
- 4.00 Afternoon Refreshments
- 4.30 **Panel:** Taiwan forward - Positioning Taiwan in the global private wealth markets
- 5.15 **Panel:** Chartering the Islamic way of wealth: Integrating principles of Islamic finance into wealth management initiatives

THURSDAY
26 MARCH 2009

OPERATIONS & RISK MANAGEMENT TRACK

- 10.00 Operations risk convergence - Re-defining effective operating risk model for Private Banks in volatile times
- 10.30 Assessing the vulnerabilities of major offshore havens in money laundering
- 11.00 Morning Refreshments
- 11.30 Best practices in AML - Constructing a continuous and sustainable AML programme across the bank
- 12.15 Examining key technology for AML and deriving value from AML compliance investments
- 12.45 Networking Lunch Reception
- 2.00 Improving customers' experiences through automation
- 2.30 **Case Study:** Core banking system - Integration of systems interface from front to back for greater scale & scope

TUESDAY
24 MARCH 2009

SEPARATELY
BOOKABLE

PRE-CONFERENCE MASTERCLASS

THE ART OF ADVICE –THE EVOLUTION OF THE ADVISORY ROLE AND PROCESS IN ASIAN PRIVATE BANKING



Led by: **Brett King**, CEO, AAFM

* All attendees for this workshop would receive complimentary membership to AAFM.

FRIDAY
27 MARCH 2009

SEPARATELY
BOOKABLE

POST-CONFERENCE MASTERCLASS

OFFSHORE TRUST STRUCTURING AND MULTI-JURISDICTIONAL ESTATE PLANNING

ASIAN FAMILY OFFICE FORUM 2009

Your Family, Your Legacy.

Continuing the high level of debate and interactive discourse, Asian Family Office 2009 navigates pivotal and salient issues concerning Asian business families and their family office from sustaining the entrepreneurial ardour, liquidity planning to investments strategy and succession planning.

Graciousness redefined. In recent times, a growing trend amongst wealthy families has been doing good, well – philanthropy. Quintessentially, structured philanthropy (is much more than giving millions away) can help to build lasting legacy for the family. As Sir Winston Churchill once quoted “We make a living by what we get, but we make a life by what we give.” Gain valuable insights from renowned foundations as they share ardent valor on their philanthropic works globally.

We welcome you to join us in this exclusive exchange, interact directly with the formidable like minded families and their Family Office. It's all worth it!

p.s: We regret all participation and involvement for this forum are strictly restricted to Family Office, members of their families and sponsoring organization only.



TUESDAY 24 MARCH 2009

- 08.00 Registration & Breakfast
- 08.45 Chairman's Opening & Welcome Address

PARADIGMS OF SUCCESSFUL FAMILY BUSINESS IN ASIA

- 09.00 **Panel:** Asian business family round table - Growing and sustaining business & wealth for the next generation in a highly competitive world
- 09.45 **Panel:** From operators to investors - Liquidity planning for entrepreneurs
- 10.30 Morning Refreshments

CREATING A CLIENT CENTRIC STRUCTURE FOR MANAGEMENT OF FAMILY INVESTMENTS & WEALTH

- 11.00 **Panel:** Interactive discourse - The evolving role of the Family Office for the present day Asian family
- 11.45 Structuring & strengthening Family Office performance
- 12.15 Networking Lunch Reception

BUILDING OPTIMAL PORTFOLIO FOR WEALTH PRESERVATION WITH ALTERNATIVE INVESTMENTS

- 1.45 **Panel:** Assessing the current global credit market crunch & its impact on Family Office investments
- 2.30 **Panel:** The growing importance of private equity investments for Asian Family Offices
- 3.15 **Panel:** Gravitating into a global real estate investments portfolio for the Family Office
- 3.35 Putting hedge funds in focus: Assessing the values of hedge funds for family
- 3.55 Afternoon Refreshments

GENERATION NEXT: PREPARING WEALTH TRANSFER FOR FAMILY LEGACY

- 4.15 **Panel:** Keeping it in the family - Effective governance for wealth preservation
- 4.45 **Panel:** Building an optimal structure to strengthen private philanthropy
- 5.30 Cross border tax planning for the international family - Managing global exposure

EVENING AFFAIRS...



**24 MARCH 2009
TUESDAY
1800hrs – 2000hrs**

LE DAZZLING SUN-DOWN BUBBLY

Indulge in the sizzling sun-set with a glass of bubbly and hors d'oeuvres with fellow delegates of the Asian Family Office.

(For Asian Family Office delegates & invited guests only)

**25 MARCH 2009
WEDNESDAY
1800hrs – 2000hrs**

MEN IN BLACK

The launch cocktail party for Private Banking Asia 2009. A matrimony of fine entertainment, unrivalled company in blacks, selections of intoxicating cocktails and hors d'oeuvres awaits you.



**25 MARCH 2009
WEDNESDAY
2000hrs – 2200hrs**
**HALL OF FAME
INDUSTRY DINNER**



An extension from the opening cocktail reception, the soiree continues with the industry dinner. Le moment enchante is the silent auction for the philanthropists enthuses. All proceeds to charity.

BE BOND FOR A DAY!



ASTON MARTIN

Not for the faint hearted. Aston Martin is offering a select few an exclusive opportunity to be Bond for a day. Private Banking Asia (PBA) opens the doors for six lucky delegates to drive the Aston Martin themselves, then buckle up extra tight for a super drive with an Aston Martin driver at the wheel. The six lucky winners will be chosen in a prize draw at the Private Banking Asia conference on March 25 & 26, 2009. This draw is open to all PBA speakers and delegates. For the car enthusiasts, the DB series would also be on display at the conference venue. Bond femme fatale not included!

5th Annual PRIVATE BANKING Asia 2009

ASIAN FAMILY OFFICE FORUM 2009

I want to find out more about sponsorship opportunities find out more about speaking opportunities register for the conference (Please fill in below)

Register now

Private Banking Asia 2009				
Package	Private banks and wealth managers	All others	How many	Calculate your ticket
2 day conference 25 – 26 March 2009	\$2,995.00	\$4,595.00	<input type="checkbox"/>	
3 day conference <input type="checkbox"/> 24 - 26 March 2009 OR <input type="checkbox"/> 25 - 27 March 2009	\$3,995.00	\$5,095.00	<input type="checkbox"/>	
4 day conference 24 – 27 March 2009	\$4,995.00	\$6,095.00	<input type="checkbox"/>	
1 day masterclass only <input type="checkbox"/> 24 March 2009 <input type="checkbox"/> 27 March 2009	\$2,095.00	\$2,095.00	<input type="checkbox"/>	
Total				

Get S\$300 off each conference ticket if you book before 31 December 2008. Not applicable for 1 day pass.

Asian Family Office Forum 2009			
Package	Regular fee	How many	Calculate your ticket
1 day Forum 24 March 2009 (Note that registration is only open to family office & members of the business family. To qualify as an attendee, please contact Valerie Su at (65) 6322 2721 or email: valerie.su@terrapinn.com)	S\$1,995.00	<input type="checkbox"/>	
1 day Forum + masterclass 24 & 27 March 2009	S\$2,995.00	<input type="checkbox"/>	
Total			

All tickets include refreshments, lunch and full conference documentation. The fee does not include hotel accommodation.

* Networking dinner is open to conference delegates only.

* 7% GST applicable to all local delegates

* Only 1 discount scheme applies

Your details

Delegate name

Job title Organization

Address

Post code Country

Tel Fax

Email

Authorizing manager Authorizing manager signature

Payment details

Payment is due in 7 days. By signing and returning this form you are accepting our terms and conditions.

- Bank transfer Crossed cheque payable to Terrapinn Pte Ltd
 Mastercard Visa American Express JCB

Card number - - - Expiry date: ____/____/____

Card holder's name Card holder's signature

Bank Transfers: Payment by bank transfer must quote the delegate name and reference 171411. Transfers should be made to Standard Chartered Bank, 6 Battery Road, Singapore 049909. **Account No. 01-008-9045-8**

Unpaid registrations will be billed 50% of the registration fee if you do not attend the event. You will, however, be given access to online contact system and a copy of the conference documentation will be sent to you

How to book your ticket

Online

It's quicker and easier to book and pay online go to www.terrapinn.com/2009/pbasg and click on register now

Offline

Complete this form and fax it back to +65 6223 3554 or call +65 6322 2700 and we'll take your booking over the phone. For registration enquiries, you can also call +65 6322 2700 or email us at linda.yap@terrapinn.com

Group bookings

Why not send your team and save more. Send 3 delegates and save 10%*
 Send 6 delegates and save 20%
 Call +65 6322 2700 or go online and register www.terrapinn.com/2009/pbasg

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 the Terrapinn group; or reputable third parties.

Cancellation policy

Should you be unable to attend, a substitute is welcome at no extra charge. Alternatively, you may choose to credit the full value of your registration towards a future Terrapinn event. 50% of the delegate fees will be charged for cancellations received in writing up to 14 days before the event date. The company regrets that no refunds will be made for cancellations received less than 2 weeks prior to the conference. A complete set of course documentation will, however be sent to you. Terrapinn reserves the right to cancel or alter the content and timing of the program or the identity of speakers for reasons beyond its control.

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LEVERAGE ON THE SUCCESS OF ASIA'S MOST ESTABLISHED PRIVATE BANKING ASIA 2009

With over 350 delegates, Private Banking Asia is Asia's largest and leading conference for the private wealth management. If you are serious about profiling and positioning your company to the private wealth management sector and thought leaders through a strategic and tested platform, join us as leading speakers, partners and sponsors to enjoy unsurpassed benefits and returns.



Speaking, sponsorship and showcase opportunities are limited. For a confidential discussion, contact Valerie Reena Su at +65 6322 2721, valerie.su@terrapinn.com on the various opportunities available

Platinum sponsor:



Macquarie Group (Macquarie) is a global provider of banking, financial, advisory, investment and funds management services.

Macquarie's main business focus is making returns by providing a diversified range of services to clients. Macquarie acts on behalf of institutional, corporate and retail clients and counterparties around the world.

Macquarie Group Limited is listed in Australia (ASX:MQG) and is regulated by APRA, the Australian banking regulator, as the owner of Macquarie Bank Limited, an authorised deposit taker. Macquarie also owns a bank in the UK, Macquarie Bank International, which is regulated by the FSA. Macquarie's activities are subject to regulation by over 100 agencies around the world.

Macquarie's approach to risk management is long-standing. Strong risk management practices are embedded in business unit management with central oversight of credit, market, funding, compliance and operational risk. These, together with committed, quality staff are key drivers of Macquarie's success.

Macquarie has been active in Asia for over a decade, establishing an office in Hong Kong in 1994. Today, Macquarie has more than 2,000 professionals in 11 markets across Asia. This team forms part of Macquarie's global network, which operates in more than 60 office locations in 25 countries and employs more than 13,000 people. Assets under management total more than \$A230 billion.



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