23 & 24 November 2009
Renaissance Harbour View Hotel, Hong Kong

5th Annual
Private Wealth Management
Forum Asia

Going back to basics and re-orienting the business model to rebuild client trust

- Management and client-facing strategies for rebuilding client trust
- Re-orienting the business platform in light of regulation
- How are boutique banks and local banks pursuing the opportunities?
- Investment trends in tough times – reshaping your clients’ portfolio

Featuring key speakers including:

- Kathryn Shih, CEO Wealth Management Asia Pacific, UBS AG
- Anuj Khanna, Head of Private Banking, North Asia, Credit Suisse
- Lok Yim, Head of North Asia, Private Wealth Management, Deutsche Bank
- Joanna Chu, Head of North Asia, Barclays Wealth
- David Hansson, Head of Equity Derivatives Marketing Asia Ex-Japan, J.P. Morgan
- Renato de Guzman, Chief Executive Officer Asia Pacific, ING Asia Private Bank
- Eng Huat Kong, Managing Director, Global Wealth Management, Merrill Lynch International Bank
- Peter Flavel, Global Head, The Standard Chartered Private Bank
- Bruce VonCannon, Chief Representative, Banque Privée Edmond de Rothschild SA
- Carol Pepper, Chief Executive Officer and Founder, Pepper International LLC
- Christian Stewart, Managing Director, Family Legacy Asia (HK) Limited

www.euromoneyseminars.com/PWMAsia09

Save US$300
Book before 9 October 2009
(see back page for details)

Media partners:

Online media partner:
Day One: Monday, 23 November 2009

08:30
Registration and morning refreshments

09:00
Chairman’s opening remarks

09:15
Keynote address: Overcoming challenges for the Asian private banking industry
- Trends in Asia’s private banking industry in extraordinary market conditions
- Challenges for safeguarding your clients’ wealth under the current market conditions
- Generating new clients amidst the intense competition
- Tapping the emerging private wealth of China and India
  Kathryn Shih, CEO Wealth Management Asia Pacific, UBS AG

09:45
Keynote address: Management strategies for rebuilding client trust
- Client behaviour patterns over the last year
- Looking at the global, regional and local scales
- Which strategies fit which type of client?
- How can diverse local strategies be coordinated on a regional level?
  Anuj Khanna, Head of Private Banking, North Asia, Credit Suisse

09:55
Morning coffee break

10:05
A shift towards bonds, currencies and gold-linked investments
- Measuring risk appetites and managing client expectations
- Diversifying portfolios and asset allocation strategies
- Choosing the right ETF and fitting it into a portfolio
- The decline of the hedge fund – what types of funds are best to invest in today?
- Commodities as an investment in a resource scarce world
- Is it safest to keep capital as cash and currency linked products?
- Back to basics – what are the preferred ways to measure credit risk?
- Is equity still a long term investment?
- Can investments deliver expected returns without leverage?
  Carol Pepper, Chief Executive Officer and Founder, Pepper International LLC

12:50
Lunch

14:10
Is the downturn an opportunity for boutique private banks?
- Where are their new clients coming from?
- How can boutique banks differentiate themselves?
- Trends in open architecture and what that means for boutique banks
- Getting access to products
  Bruce VonCannon, Chief Representative, Banque Privée Edmond de Rothschild SA

Euromoney Seminars is a division of Euromoney Institutional Investor (Jersey) Limited.
14:40
Panel discussion: Institutionalisation of wealth through family offices
- Growth markets in Singapore and Hong Kong
- Who is providing client services – private banks or independent offices?
- How price sensitive is the market for family offices?
Christian Stewart, Managing Director, Family Legacy Asia (HK) Limited
Roy Chen, Chairman & CEO, Grace Financial Limited
Carol Pepper, Chief Executive Officer and Founder, Pepper International LLC

15:30
Afternoon tea break

16:00
Winning local Asian clients in the current climate
- Has moving onshore as a growth strategy worked?
- Client driven collaboration with other private banks
- How important is brand name and service?
- Organic vs. inorganic growth
Stephen Richards Evans, Regional Head, The Standard Chartered Private Bank, North East Asia

16:30
Responding to risk aversion of trustees
- Different approaches to risk aversion
- What can be included in a trust?
- How can independent trustees differentiate themselves from big private banks?
- How is documentation being tightened up to define responsibility for risk?
- The complications of including entrepreneurial activities in trusts
Samantha Bradley, Partner, Withers Worldwide

17:00
Chairman's closing remarks followed by drinks reception

Day Two:
Tuesday, 24 November 2009

08:30
Morning refreshments

09:00
Chairman's opening remarks

09:15
The future of structured products – trust, transparency and trends
- Growth, fall and rebound of structured products volumes globally
- Demand and regional differences in Asia with a global perspective
- Responding to a greater awareness of counter-party risk
- How will flow products generate revenue?
- The need for transparency
- What does the future hold for structured products as an asset class?
David Hansson, Head of Equity Derivatives Marketing Asia Ex-Japan, J.P. Morgan

09:45
Panel discussion: Niche markets – making money in unexpected ways
- Predicting trends in niche markets
- Exploiting illiquid market conditions through niche investments?
- How can niche and highly specialised products fit into a portfolio?
- Can specialised products really be structured so they are crisis proof?
- What to look for when investing in a specialised niche fund
Manuel Gerber, Art Market Investment Advisor
Andrew della Casa, Director, The Wine Investment Fund

10:15
Trends and core issues in succession planning
- What is succession planning?
- Dealing with governance issues
- Tax issues when the family is a multinational family
- What can go wrong?
- The issues when the business is included in the trust
- Avoiding disputes and dealing with them when they do arise
Mimi Hutton, Partner, Withers Worldwide, Head of Hong Kong Branch, STEP

10:45
Morning coffee break

11:10
What are the effects of compliance and regulation on reshaping the business platform?
- The importance of a well-informed and competent marketing officer
- Policy reactions to the Lehman Brothers bankruptcy
- Hong Kong working group results
- What are the internal shifts within private banks?
- Clarification of liability documentation

11:40
Tax considerations in wealth management for non-resident Indians
- How will the new OEDC tax regulations impact Asian private wealth?
- Establishing the objectives of clients
- Identifying the correct tools and using them effectively
- What has to be considered when managing both onshore and offshore wealth?

12:15
Chairman's closing remarks and close of conference followed by lunch

TO REGISTER:
: www.euromoneyseminars.com/PWMAsia09
: registrations@euromoneyasia.com
: (HK) +852 2842 6995 / (UK) +44 20 7779 8999

Euromoney Seminars reserves the right to alter the venue and/or speakers. © Euromoney Seminars 2009
5th Annual Private Wealth Management Forum Asia

Registration Fees

<table>
<thead>
<tr>
<th>Standard Conference Fee</th>
<th>Early Registration Fee (before 9 October 2009)</th>
</tr>
</thead>
<tbody>
<tr>
<td>One Delegate</td>
<td>US$1,999</td>
</tr>
<tr>
<td></td>
<td>US$1,699 (save US$300)</td>
</tr>
</tbody>
</table>

Please quote EAE189 on all correspondence

5 Easy Ways To Register

Online: www.euromoneyseminars.com/PWMAsia09

Email: registrations@euromoneyasia.com

Fax: (HK) +852 2111 1400 / (UK) +44 20 7779 8603

Telephone: (HK) +852 2842 6995 / (UK) +44 20 7779 8999

Post: Olivia Wong
Euromoney Seminars
Euromoney Institutional Investor (Jersey) Limited
7/F Printing House
6 Duddell Street
Central, Hong Kong

Delegates

Delegate 1 (please print)
Title: (Mr/Mrs/Miss/Dr/Other):
Name:
Position:
Company:
Address:
Postcode:
Country:
Tel:
Fax:
Email:

Delegate 2 (please print)
Title: (Mr/Mrs/Miss/Dr/Other):
Name:
Position:
Company:
Address:
Postcode:
Country:
Tel:
Fax:
Email:

The information you have provided will be safeguarded by Euromoney Seminars who will use it to keep you informed of relevant Seminars in the future. Please tick how you would prefer to receive future information: Mail / Fax / Email, and fax back this form to UK +44 (0)20 7779 8603. If you wish to be contacted by telephone, fax, email or alternatively email, please tick the relevant box and fax back this form to UK +44 (0)20 7779 8603.

Payment

Payment can be made in one of four easy ways – please tick the appropriate box.

Payment by Bank Transfer
Bank transfer quoting EAE189
Beneficiary: Euromoney Seminars
Account No: 808-172159-001 (HKD), 808-172159-201 (USD), 808-172159-276 (GBP)
Swift Code: HSBCHKHHHHK
HSBC Limited, HSBC Main Building, No.1 Queen’s Road, Central, Hong Kong

Cheques should be made payable to Euromoney Seminars. A receipted invoice will be sent to all delegates.

Invoice me (Option not available after 6 November 2009)
Please complete and return this form together with a copy of your bank transfer or cheque, payable in US$ to Euromoney Seminars, and send by post or fax to: Euromoney Seminars, Euromoney Institutional Investor (Jersey) Limited, 7/F Printing House, 6 Duddell Street, Central, Hong Kong
Tel: +852 2842 6995; Fax: +852 2111 1400
Email: registrations@euromoneyasia.com
www.euromoneyseminars.com

Please note that in completing this booking form your undertake to adhere to the cancellation and payment terms listed below.

Signature:
Date:
Approving Manager:
Position:

Administrative Information

Venue:
Renaissance Harbour View Hotel
1 Harbour Road
Wanchai
Hong Kong
Tel: +852 2802 8888
Fax: +852 2802 8833

Travel & Accommodation:
Euromoney Seminars has negotiated a special group rate at the Renaissance Harbour View Hotel for conference attendees. Full details will be provided with the joining instructions sent on receipt of booking. If you have any questions in this regard, please contact Karen Au, Logistics Manager on (HK) +852 2842 6955 or email karen.au@euromoneyasia.com.

Cancellation policy: If you cannot attend you must cancel your registration in writing by 6 November 2009 to receive a refund less a 10% administration charge. We cannot accept verbal cancellations. Cancellations received after 6 November 2009 are liable for the full conference fee. We suggest you send a substitute to attend in your place at no extra charge.

Registration fee: The registration fee includes participation in the conference, lunch and documentation material, which will be distributed at the beginning of the event. All bookings are considered binding on receipt of the booking form.

Cannot attend? Please pass this brochure on to a colleague or you can purchase the documentation for US$599

For immediate information on this and related events, please call our hotlines

Telephone: (HK) +852 2842 6995
or (UK) +44 20 7779 8999
or USA toll free (free from within the USA) (USA) +1800 437 9997
or alternatively email: hotline@euromoneyplc.com

For further information on sponsorship or exhibition opportunities please contact Emma Donald, Tel: (HK) +852 2842 6946,
Fax: (HK) +852 2111 1400, email: emma.donald@euromoneyasia.com