WEALTH & INVESTMENT

SUMMIT & AWARDS 2022

27 September 2022

Park Hyatt Dubai
United Arab Emirates

Organised by:

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MEDIA PACK

Overview

The economies of GCC and the wider Middle East are swiftly matching, and in some places, surpassing the longer established world. This is also true of the financial services providers catering for the more prosperous and high net worth peoples of our part of the world.

As private banking, wealth & investment management and family offices expand in number and sophistication to serve the region's growing market, so too do the questions and demands brought by newer generations moving into the high net worth brackets; by the application of high-technology and digitisation to wealth & investment management, and the profound changes and challenges the world faces in the coming decade.

The **Wealth & Investment Summit** will avidly debate the trends, the very real opportunities and the coming challenges facing the Private Banking and Wealth Management providers of our region.

FACTS & FIGURES

300+
DELEGATES

30+
INDUSTRY-LEADING SPEAKERS

3
PRESENTATIONS

1
AWARDS CEREMONY

WHO ATTENDS

FAMILY OFFICES

REAL ESTATE INVESTORS

VENTURE CAPITALISTS

WEALTH / ASSET MANAGERS

PRIVATE BANKERS

ENTREPRENEURS

ALTERNATIVE ASSETS INVESTORS

Agenda

08:00-09:00	**Registration & Networking**
09:00-09:05	**MEA Finance Opening Note**
09:05-09:15	**Welcome Note**
09:15-09:30	**Keynote Address**
09:30-10:15	**Panel 1: Developments in Middle Eastern Succession and Estate Planning** Even when planned, succession is frequently a complex and fraught experience, with the global nature of families in these times bringing yet more complexities to navigate. How have instruments such as Foundations, SPV Mortgages or the DIFC Will and Probate Registry (WPR) smoothed the path of generational change in the region? Can the technologies that are coming on stream make the succession processes any easier at what is often a time of high stress? **Speakers** • **Damien Morgan** Senior Wealth Planner, Private Banking, UAE, **HSBC** • **Leevyn Isabel** Private Clients Director, **Ocorian** • **Rahul Chopra** Head of Dubai, Senior Executive Officer & Managing Director **Charles Monat Associates** • **Samir Raslan** Managing Director, Vice Chairman, Origination **Citi Global Wealth - EMEA** • **Tim Searle** Founder and Chairman, **Globaleye**
10:15-10:30	**Ocorian Presentation**
10:30-11:15	**Panel 2: Wealth and Society – Evolving ESG & Philanthropy** The prosperous and high net worth, conscious of their privilege and the wider world we all share, frequently contribute to, or instigate efforts to make positive contributions. As newer generations with new social justice and environmental concerns move into the HNW sphere, what are becoming the current leading philanthropic requirements of your clients and how are they shaping your ESG policies? **Speakers** • **An Kelles** Director - GCC, **Jersey Finance** • **Christofer Langner** Head of Investment Strategy, **First Abu Dhabi Bank** • **Faisal Hasan, CFA** CIO, Head of Asset Management, **Al Mal Capital, UAE** • **Mario Al-Jebouri** Managing Director & Head of Middle East, **Banque Cantonale de Genève (BCGE)** • **Vivek Gehani** Head of Global South Asia & Middle East, **Bank of Singapore** **Moderator** • **Bhaskar Dasgupta** Independent Board Director and Advisor, Senior Advisor - GCC, **Sheikh Hamdan Bin Ahmad Al Makhtoum Private Office**
11:15-11:45	**Coffee Break**

Agenda

11:45-12:30

Panel 3: Safe Haven Investments - Near & Mid-term Opportunities for Portfolio Enhancement

Gold, Real Estate, US Treasury Bonds, Preferred Stocks and Corporate Bonds are currently among the best safe investments. How will these options fare in the coming years and in todays' inflationary environment? What currently are the optimum sectors and what new investment options and techniques will arise to protect against or mitigate bear markets and black swan events. What further benefits can such investments bring to the private or institutional investor?

Speakers

- **Anita Gupta**
  Head of Equity Strategy – CIO Office Wealth Management, **Emirates NBD**
- **Dr. Niels Zilkens**
  Lead Market Head Arabian Gulf & NRI, **UBS Global Wealth Management**
- **George Hojeige**
  CEO, **Virtuzone**

12:30-12:45 **Presentation**

12:45-13:30

Panel 4: The Growth of Family Office in the Middle East

Family offices are growing in popularity in the Middle East, driven by factors including the need for family businesses structures more akin to a corporate set-up to manage wealth, by the fact that over the coming decade will see vast sums passing between generations with a consequent need for better organisation, and a growing number of overseas families coming to reside in the UAE. How will regional service providing market change to accommodate this growth and what do these families need to be mindful of when they arrive in the region?

Speakers

- **Biju Thomas**
  Senior Director, Private Banking, **Mashreq**
- **Farzad Billimoria**
  Head of Private Banking, UAE, **HSBC**
- **Shadi AlNasr**
  Principal - Global Family Office, **The Bank of New York Mellon**

Moderator

- **Ismael Hajjar**
  Partner, Entrepreneurial Private, Business, Family Office Services, **PwC Middle East**

13:30-14:30 **LUNCH**

AGENDA

14:30-15:15

Panel 5: Investment Alternatives: Where will be the best rewards lie in the coming years of change?

The world will significantly change in the coming decade with geopolitics, climate change, demographic pressures and economic stresses growing more evident. What might this upheaval mean for investment and portfolio management strategies? Will Equities, Fixed Income Assets and Forex retain the prominence they have in the markets or will alternative investment options such as in the Metaverse, NFT's, Tokenisation and crypto assets grow to dominate?

Speakers

- **Arjun Mittal**
  Founder, **Abbey Road Investment Group**
- **Devesh Mamtani**
  Chief Market Strategist, **Century Financial**
- **Haitham Juma**
  Unit Head - Investment Solutions, **National Bank of Fujairah**
- **Mubashar Ayoob**
  Head of Wealth Management - Gulf, **Deutsche Bank**
- **Omar Al-Gharabally**
  Chief Investment Officer, **Greenstone Equity Partners**
- **Vipul Kapur**
  Managing Director & Head of Private Banking, Mashreq

15:15-16:15

Presentation by Brett King, World-renowned futurist and speaker, Startup Founder, Bestselling Author, Radio Host, TV Commentator

16:15-16:45

Coffee Break

16:45-17:30

Panel 6: The Digitisation of Wealth Management: Can premium service be maintained or even heightened?

Newer and more digitally native generations are moving into the high net worth brackets through entrepreneurship, advancement within family business, succession or inheritance, so how is the demand for secure, intuitive and high-yielding asset and wealth management being satisfied by technology vendors and the traditional wealth service providers? Can digital innovations developed by technology for wealth management provide the kinds of specialized tailored services and advisory skills that HNWI's are accustomed to receiving from premium finance services providers?

Speakers

- **Alex Gemici**
  Chief Executive Officer, **Greenstone Equity Partners**
- **Damian Hitchen**
  CEO, **Saxo Bank MENA**
- **Devid Jegerson**
  Head of Customer Experience and Platform Development, **National Bank of Fujairah PJSC**
- **Mustafa Bosca**
  Managing Director and Partner, **Boston Consulting Group (BCG)**
- **Neale Croutear-Foy**
  Chief Technology Officer, **Securrency Capital**

Moderator

Brett King
Futurist, Bestselling Author, Founder - Moven, Media Personality

17:30-17:35

Closing Remarks

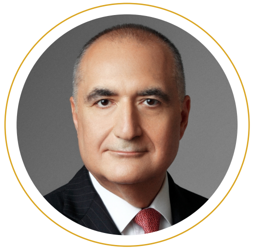
18:00-19:00

Pre-awards Networking

19:00-20:00

Awards Ceremony

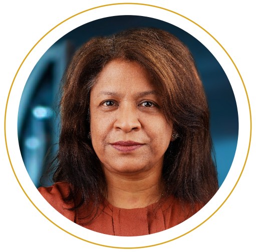
Speakers



Alex Gemici
Chief Executive Officer
Greenstone Equity Partners

An Kelles
Director - GCC
Jersey Finance

Arjun Mittal
Founder
Abbey Road Investment Group



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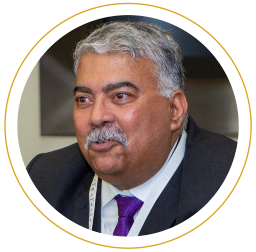
Head of Equity Strategy
Emirates NBD



Dr. Bhaskar Dasgupta
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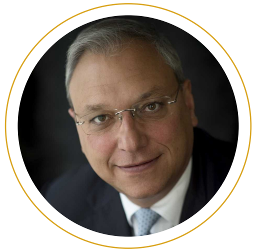

Mario Al-Jebouri
Managing Director & Head of Middle East
Banque Cantonale de Genève (BCGE)

SPEAKERS

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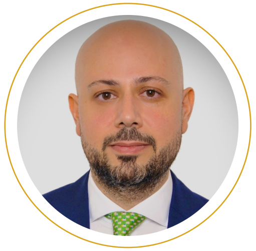

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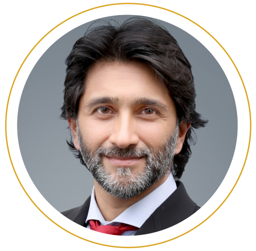

Vivek Gehani
Head of Global South Asia
& Middle East
Bank of Singapore

Vipul Kapur
Managing Director &
Head of Private Banking
Mashreq

Special Guest Speaker

Brett King

Futurist, Bestselling Author,
Founder – Moven,
Media Personality

Brett King is a world-renowned futurist and speaker, an International Bestselling Author, and a media personality who covers the future of business, technology, and society. He has spoken in over 50 countries, at TED conferences, given opening keynotes for Wired, Techsauce, Singularity University, Web Summit, The Economist, IBM's World of Watson, CES, SIBOS and many more. He has appeared as a commentator on CNN, CNBC, BBC, ABC, Fox, and Bloomberg. He previously advised the Obama administration on Fintech policy and advises regulators and bank boards around the world on technology transformation.

King hosts the world's first and #1 ranked radio show on FinTech called "Breaking Banks" (180 countries, 7m million listeners). He is the Founder and Executive Chairman of Moven, a successful mobile start-up, which has raised over US$47 million to date, with the world's first mobile, downloadable bank account, available in the United States, Canada, UK, Indonesia, Russia, Tanzania, Brazil, Saudi Arabia, and New Zealand.

Named"King of the Disruptors" by Banking Exchange magazine and the "Godfather of Fintech" by The Australian newspaper, King was voted American Banker's Innovator of the Year, voted the world's #1 Financial Services Influencer by The Financial Brand and was nominated by Bank Innovation as one of the top 10 "coolest brands in banking". He was shortlisted for the 2015 Advance Global Australian of the Year Award for being one of the most influential Australians living offshore. His books have been released in over a dozen languages and he has achieved bestseller status in 20 countries. His fifth book Augmented: Life in the Smart Lane was an international bestseller, top 10 in North America and China, and the book remained in the top-10 on Amazon for 2 years. Bank 4.0, which followed, spent 2 years on the Amazon bestsellers list for Banking books. His coming book for the post-Coronavirus world is entitled The Rise of Technosocialism and is due out early 2021.

Awards Categories

The **Wealth and Investment Awards 2022** recognizes leading investment banks, private banks, wealth advisors, and technology providers in the Middle East and Africa for their achievements, product innovation, and leadership in safeguarding and protecting the financial wellness of private individual investors and family offices.

Acknowledging the accelerating rate of wealth transfers to new age investors within the MENA wealth market, the **Wealth and Investment Awards 2022** rewards the excellent pursuit of digital-first solutions as an important investment tool to address investment challenges and discover new opportunities.

The awards ceremony will take place in-person on 27 September 2022 at Park Hyatt Dubai, United Arab Emirates.

KEY DATES

OPEN FOR ENTRIES
15 JUNE 2022

SUBMISSION DEADLINE
19 AUGUST 2022

JUDGING PROCESS STARTS
22 AUGUST 2022

AWARDS CEREMONY
27 SEPTEMBER 2022

Awards Categories

FINANCIAL INSTITUTIONS

Best Private Bank – by Country
This category is open to all private banking institutions operating inside a regional country (Middle East & Africa). It will be awarded to the private bank showing the most outstanding past 12 months based on factors including core performance, innovation, adaptability and customer experience.

Best Domestic Private Bank – by Country
This category is open to private banks founded, based and operating in its home domestic market, showing the most outstanding past 12 months based on factors including core performance, innovation, adaptability and customer experience.

Best Global Private Bank – by Country
This category is open to global private banks showing the most outstanding past 12 months based on factors including core performance, innovation, adaptability and customer experience.

The Best Private Bank
This category will award the overall most outstanding private bank, whether domestic or global, local to a single jurisdiction or across the region based on factors including core performance, innovation, adaptability and customer experience.

Best Pure Play Private Bank
This category will decide the private bank whose sole activity is private banking and wealth management services to high-net-worth individuals, that performed best across the range of bespoke services including advice, product development, ROI and utilisation of technology.

Best Islamic Private Banking Service
This category will award the Islamic private banking institution whose products and solutions, founded on and compliant with the Shari'ah moral and ethical code, performed best for their clients and contributed positively to the business.

Best Family Office Service
Awarded to the family office services provider offering bespoke financial products, services and guidance with the best options in terms of portfolio growth, digital services and meeting clients investing principles, philanthropic interests and ethics.

Best Regional Asset Management Firm for HNWI's
The award in this category will be presented to the regionally founded and based (Middle East & Africa) Asset Management firm that has demonstrated the best results for their clients' portfolios as a whole, increasing their financial performance in either real terms or relative to the prevailing post-pandemic conditions.

Best Global Asset Management Firm for HNWI's
The award in this category will be presented to the Global Asset Management firm that has demonstrated the best results for their clients' portfolios in this region (Middle East & Africa) as a whole increasing their financial performance in either real terms or relative to the post-pandemic conditions.

Best Fund Provider for ESG investments
The winner in this category will be the private bank, wealth management business or asset management firm that demonstrates it has provided the best results based on ethical investments focusing the full spirit of the meaning of the ESG acronym.

Awards Categories

Best Fund Provider for Sustainability related Investments

This category awards the private bank, wealth management business or asset management firm that demonstrates it has provided the best results based on investments made that can show either positive effects or the least negative impacts on the environment.

Best Real-estate Investment Firm

The award in this category will be presented to the real-estate investment business that consistently provides the best land and real-estate asset investment opportunities to investors based in the region.

Best Succession Planning Services

This category awards the bank or business that has been acknowledged to provide the best advice, guidance, instruments and sensitivity to the complex needs of their clients at the time of the transfer of assets to those chosen, or in line to take charge of a valuable legacy.

Best Alternative Investments Provider

This is awarded to the private bank, wealth management business, asset management or specialist investment firm that demonstrates the best advice, returns from and understanding of the alternative assets and investments available today to HNWIs, including opportunities in the metaverse, NFT's, Crypto Currencies and Tokenisation.

Best Wealth Planning and Investment Consultancy Services

This awards the business or institution with the best track record of creating a path helping clients to build, protect and transition their wealth by taking a holistic overview of their financial life including retirement, tax, legacy and business planning.

Best Discretionary Portfolio Management (DPM)

The best DPM award will go to the bank or fund management firm that, on behalf of their clients has generated the most value with strong performance, and by staying close the clients, keeping them invested long enough to see real benefits.

Best Foundations Service

This will be awarded to the company that offered the best service and advice in the establishment of foundations and the maintenance of these entities through and including the provision of asset protection, privacy, philanthropy, succession, legacy planning and wealth planning, particularly where the family is internationally mobile with assets in multiple jurisdictions.

Best Brokerage and/or Investment Management Platform

This will be awarded to the Online Brokerage Accounts and Trading Platforms that offers unparalleled research and assets variety and provides an extensive investor education to their HNWI clients. The winner will have successfully given strong account management options including any contingencies for every conceivable situation, competitive cost and transparency in pricing disclosures, efficient account management usability that gives their clients the clarity of different investment portfolios.

Best Robo or AI Investment Provider

This category is awarded to the institution with the Robo Advisory and AI Investment service providing the best options for clients with high balances. Ease of use or a hands-off experience, ease of connections to a bank account, asset allocation, portfolio rebalancing and tax optimization are key considerations, as well as offering proprietary and diverse portfolio options.

Awards Categories

WEALTH & INVESTMENT TECHNOLOGY

Best Wealth & Investment Technology Company
This will be awarded to the wealth and investment technology provider for harnessing technology enabling the provision of greater opportunities for wealth offices and institutions to expand their clients businesses through digitally enabled investment services.

Best Wealth and Portfolio Management Software Solution
This will be awarded to the wealth management software company whose products and services provide wealth management institutions with the best tailored investment strategies for their clients' portfolios, bringing advice, orders, compliance and risk together, allowing focus on delivering premium levels of service and the clearest overview of their clients relationships and positions.

Best Digital Innovation and Services in Wealth Management
This category will be awarded to the financial technology company that has succeeded in providing the most innovative and groundbreaking digital services for wealth management and private banking institutions and clients. The winner will have successfully balanced the convenience and utility of digitalisation with the bespoke, premium experience expected by HNWIs.

Best Investment Risk Analysis and Portfolio Management Solutions Provider
This will be awarded to the financial technology company that provides the best solutions for detailed analysis of potential deals or investments through analysis of reporting scenarios and scenario simulations to determine the best possible investment opportunities.

Best Client Profiling and Onboarding Solutions Provider
Awarded to the wealth technology company that can best expedite the onboarding process, providing relationship managers with a comprehensive overview of customer information, automates compliance requirements and manual processes and supports interaction throughout the client journey.

Best Discretionary Portfolio Management (DPM) Solutions Provider
Awarded to the technology provider with the best performing DPM platform. Creating bespoke investment mandates, automatic monitoring of exposure to risk, maintaining complex asset class groups, reduction of manual processes and reducing costs for providing discretionary advice will be key factors for consideration in this category.

Best Cyber Security Technology
Awarded to the cyber-security provider that shows best operational practices and security provision in preventing general or targeted cyber-attacks potentially resulting in theft of assets, confidential intellectual property and interruptions of service against the financial institutions working with, and service providers to HNWI's.

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The **Wealth & Investment Summit** offers to its sponsors a comprehensive package of benefits that varies from speaking opportunities, exhibition space, and a variety of branding exposure to promote your services to your target audience.

The Summit is the best place to meet key decision makers, engage with investors, and open doors for collaboration.

If you are interested in learning more about the packages we have, please contact us.

WHY SPONSOR?

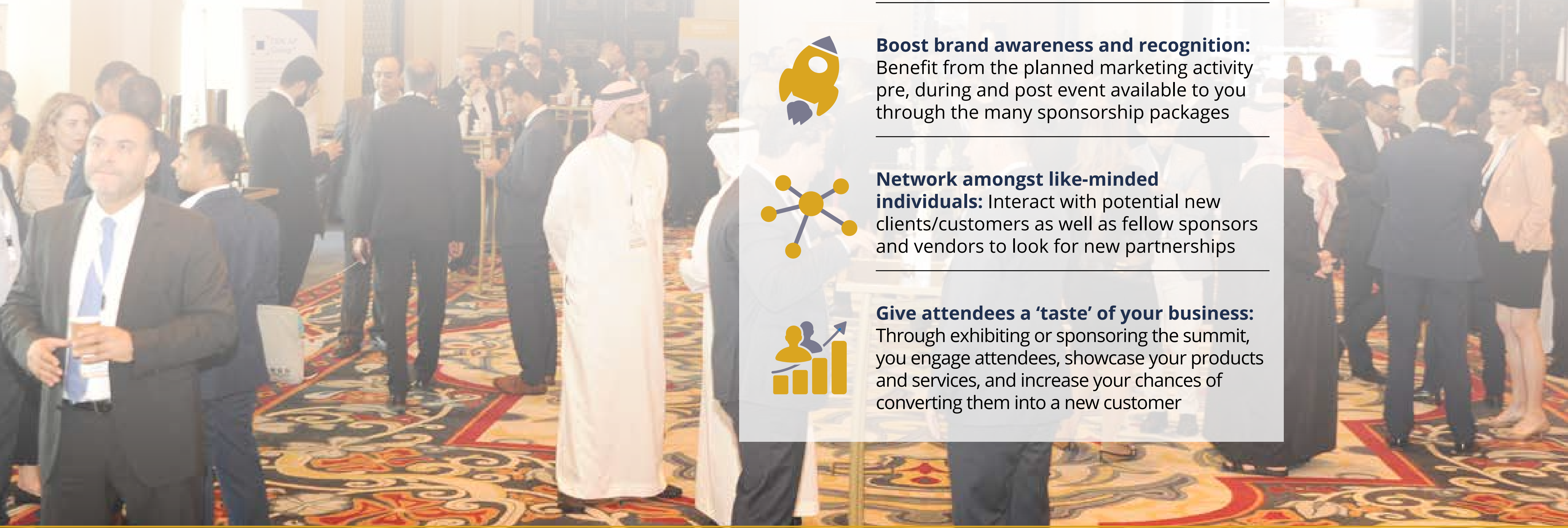
Create, develop and enhance credibility: Highlight your products and services with a captive audience, build trust, respect and establish rapport with new prospects and be recognized as industry leading experts

Generate new leads and win new business: Create new professional relationships with a qualified audience in attendance at the summit

Boost brand awareness and recognition: Benefit from the planned marketing activity pre, during and post event available to you through the many sponsorship packages

Network amongst like-minded individuals: Interact with potential new clients/customers as well as fellow sponsors and vendors to look for new partnerships

Give attendees a 'taste' of your business: Through exhibiting or sponsoring the summit, you engage attendees, showcase your products and services, and increase your chances of converting them into a new customer



Sponsorship Options

Benefits	Platinum	Gold	Silver	Lunch	Lanyard	Badge	Exhibitor
Exclusive to one company only	●			●	●	●	
Opportunity to do Welcome Note	●						
Access to All Sessions	●	●	●	●	●	●	●
Standalone Presentation	●	●					
Panel Member in Discussions	●	●	●				
Exhibition Booth Space	●	●	●	●	●	●	●
Advert in Event Booklet	●	●	●	●	●	●	●
Logo on Website with Hyperlink	●	●	●	●	●	●	●
Logo on all Marketing Collateral	●	●	●	●	●	●	●
Branding on Post Event Report	●	●	●	●	●	●	●
Reserved seats at the Awards	8	8	8				
Cost (USD)	**40,000**	**30,000**	**20,000**	**15,000**	**12,000**	**12,000**	**10,000**

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