MASTER CLASS SERIES

The Art of Asian Wealth Management

Date:
5th - 6th November, 2012

Venue:
Hong Kong

Registration fee:
US$2,400

Length of Course:
2 days

Time:
9am to 5pm per day

Language:
English

For more information:
Felicia Kong

Tel:
+852 2165 1616

Email:
training@theasset.com

Website
www.TheAsset.com/en/training

Introduction

A structural transformation is sweeping Asia's wealth management business, which is forcing private bankers to re-engineer their processes and substantially enhance their knowledge of their clients and their businesses.

As the role of the wealth manager moves from a "relationship manager" advising on "passive assets", to being a proactive trusted consultant, who shares the client's passion for their business and has developed skills and domain expertise to understand their interests. There has also been a structural shift in how wealthy clients are identified, how relationships are offered and indeed, what services need to be offered.

Course Description

This is the only course that is customized to Asian wealth management and focussed on providing private bankers and wealth managers with practical real-life scenarios from Asia and delivering the templates and tools to become a proactive and trusted consultant.

In addition, the course takes time to help participants identify potential clients who may not currently meet the traditional definition of "wealthy", but who may be at the point of "unlocking" massive value. For example, a privately owned technology company who may do an ADR listing or a life sciences company that may "out-license" a molecule and generate over a $100 million in a single deal..

Outcome

- Learn how Asia's wealthy think and invest;
- "Re-tool" yourself to handle Asia's wealthy entrepreneurs;
- Identify clients who may not currently meet the traditional definition of "wealthy", but who may be at the point of "unlocking" massive value;
- Recognise the Asian Wealth Cycle;
- Understand family wealth and the role of decision makers;
- Implement successful strategies and methodologies for working with Asia's wealthy

"Thanks for a great course.... Very interesting. I shall have my whole team attend"

"Very practical and non-academic, trainer's expertise is based on the breadth and depth of his experience"

"Very entrepreneurial approach"

"We discovered a big gap in what we can do on the corp finance side and what we would like to do"

"Enabled us to look at our client base & business opportunities differently, in a very forward-looking way"

"Very relevant; very practical; many excellent ideas"

Why The Asset Training?

The Asset Training brings together the expertise of Asset Publishing & Research Limited in financial media, conferences and research, with highly experienced frontline corporate, investment and banking leaders.

Each training course has been exclusively designed and will be taught by expert practitioners with extensive knowledge in their areas of specialization. The programme is modular based and is focussed on conceptual understanding that is enhanced with Asian work examples and illustrations, to equip the participants for real-life transactions.

Course Director

Ashu Dutt is Asia's leading authority on wealth management who has first-hand experience in dealing with Asia's ultra wealthy and entrepreneurs. He has been witness to their transformation and has assisted numerous families with the generational transfer of wealth, and structuring family offices.

Over the years Ashu's master class in wealth management and his proprietary wealth management techniques have been very popular with many senior teams in Asia at some of the world's largest wealth managers, such as UBS.

Ashu Dutt is a much sought-after conference speaker and master class trainer of wealth management in Asia. His understanding and methodology for dealing with Asia's company founders, wealthy families, family offices is considered as a benchmark for best practices in the industry.

Ashu is the founder and managing director of Dutt Capital Advisors, a leading wealth management and family office advisor for the past two decades. Prior to this, Ashu was country head, India for Northbridge Capital, an investment bank. His areas of expertise included Asian M&A, real estate finance and private equity

Ashu's record of reading investment themes in Asia way before the market and his ability to stand by his views has earned him an impeccable reputation as a financial markets guru, institutional and government advisor and a best-selling financial markets author.

Ashu has written over a dozen books on investing, trading and commodities for global publishers like McGraw Hill and Wiley.

He is a certified public accountant in the state of Maryland, USA. He holds an M.B.A and a B.B.A. in finance & investments from Bernard m. Baruch College, City University of New York.

Who should attend this course?

The course is designed for wealth managers, private bankers, relationship managers at all levels, who offer wealth management services or sell and deal with financial products or services for the wealthy. It is meant for professionals at private banks, commercial banks, family offices, wealth management firms, brokerage houses and IFAs.

Includes a Premium Subscription to The Asset

As part of the course fee, delegates will also receive a one year Premium Subscription to The Asset magazine and to the www.TheAsset.com, worth US$350.

The Programme

Day One

9:00 **The Asian Wealth Opportunity**
Entrepreneurs – "blue ocean" opportunity
Why focus now?
What differentiates Asia's wealthy?
Dealing with Asia's wealthy – a specialized approach
Client corporate finance issues – a private banker's job?
Case study

10:30 Coffee Break

10:50 **The Wealth Cycle**
Approaching entrepreneurial wealth
Developing a new level of relationship with entrepreneurs
A relationship based on domain knowledge and value unlocking expertise
Scaling up domain and value unlocking knowledge base
Scaling up knowledge of precedent transactions

12:20 Lunch

13:40 **What constitutes Asian wealth?**
The Asian Wealth Management Cycle
Established wealth
New wealth
Valuation wealth

15:10 Coffee Break

15:30 **Types of Asian wealth**
Corporate to entrepreneur wealth
Understanding client motivation
Client classification
Client identification criteria
Client identification checklist

17:00 End of day one

Day Two

9:00 **Strategy & Mechanics**
Emerging areas
Advisory areas
Defining an approach
The Client Matrix
Tool box and resources

10:30 Coffee Break

10:50 **Domain expertise & price discovery**
The importance of domain expertise
Domain specialization
Precedent transaction expertise
Wealth creation through price discovery
Price discovery process

12:20 Lunch

13:40 **The corporate finance process**
Price discovery/capital raising options – Traditional
Price discovery/capital raising options – Non-traditional
The private banker's role
Client benefits of value unlocking

15:10 Coffee Break

15:30 **Understanding value unlocking**
Corporate finance options
Domain knowledge
Valuing an entrepreneur's wealth
Value unlocking options & methodologies

17:00 End of programme

The Asset Training Master Class Certificate

On successful completion of this course participants will receive a signed The Asset Training Master Class Certificate.

For more information:

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