

UBS LEADS Advance 2020

Program

UBS LEADS Advance is an exclusive and unique event for the next generation of UBS Wealth Management clients. The programme is designed to equip participants with the necessary skills to be effective leaders of tomorrow. Aimed at university graduates and final year undergraduates of any academic background, UBS LEADS Advance aims to offer excellent opportunities for participants to heighten self-awareness, enhance financial knowledge, develop inter-personal and leadership skills, and network with peers.

Year 2020 will be the 12th anniversary since the programme's inception. We have elevated the programme to include creation of a dynamic workshops plus a range of value-adding learning components. The approach is to systematically develop participants through interactive scenario-based tools that inspire them, engage their interest and sustainably embed knowledge and skills, and maximize the impact for their future applications.

This 5-day program will be held in Hong Kong. Conducted in English, This program is run by a combined team of UBS managers and third party professional trainers to deliver effective, practical knowledge and valuable skills in an appropriate yet fun learning environment. All participants will be presented with a UBS LEADS Certificate following completion of the program which they can confidently feature in their CVs.

Program Dates

July 13, 2020 (Monday)	08:30am – 18:00pm
July 14, 2020 (Tuesday)	08:00am – 18:00pm
July 15, 2020 (Wednesday)	09:30am – 17:30pm
July 16, 2020 (Thursday)	09:00am – 17:00pm
July 17, 2020 (Friday)	09:00am – 12:30pm, 19:00 – 22:00pm

Program Location

UBS Kowloon Office
25/F, The Hall
One Peking Road
Peking Road One
Tsim Sha Tsui
Hong Kong
Tel. +852-2971 5588

Dress Code

Day 1 - 4	Smart Casual
Day 5	Smart Casual
Day 5	Graduation Dinner – Cocktail dress or Smart casual

Personal Charges

Participants are responsible for their own accommodation, all in-room personal expenses, airport transfers, and commute to the program location plus activities other than those included in the main program.

UBS Contact

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Day 1 – Monday, July 13, 2020

- 08:30 am** **Registration**
** CA compulsory to greet and meet participants*
- 09:00 am** **UBS overview: Who we are and what we do?**
An introduction of UBS of its 150-year heritage and how UBS combines wealth management, investment banking and asset management businesses with our Swiss operations to deliver superior financial solutions.
- Francis Liu**
Managing Director, Head of Wealth Management Taiwan International
UBS Global Wealth Management
- 09:30 am** **UBS division deep dive: Asset Management**
- Charles Li**
Managing Director, Head of WM Client Coverage
UBS Asset Management
- 09:45 am** **UBS division deep dive: Investment Banking**
- Hannah Malter**
Managing Director, Asia Head of Equity Capital Markets Syndicate
UBS Investment Bank
- 10:00 am** **Introduction of UBS Chief Investment Office**
- Adrian Zuercher**
Head of Asset Management, APAC, Chief Investment Office
UBS Global Wealth Management
- 10:30 am** **Break**
- 10:45 am** **Ice Breaker**
- Financial Markets: What's happening now?**
- Jacob Wai**
Director, APAC, Fitch Learning
- 11:30 am** **Economics: fiscal or monetary policy?**
- 12:30 pm** **Lunch at UBS Office**
- 14:00 pm** **Efficient Frontier & Modern Portfolio Theory**
- 15:00 pm** **Break**
- 15:15 pm** **Behavioural Finance : Beyond Modern Portfolio Theory**
- 16:00 pm** **Research & Presentation Workshop**
Delegates construct an investment framework based on Macro environmental factors and understanding of financial theories.
**Participant's CA to assist session by nomination*
- 18:00 pm** **Program concludes for Day 1**

Day 2 – Tuesday, July 14, 2020

- 08:00 am** **Meet and greet with LEADS participants**
** Participant's CA compulsory to join*
- 08:30 am** **Breakfast with CEO**
** Participant's CA compulsory to join*
- Amy Lo**
Co-Head Wealth Management Asia Pacific, UBS Global Wealth Management
Head and Chief Executive, UBS Hong Kong
- 09:30 am** **Asset Classes: Introduction and an Overview of Equity**
- Herbert Lau**
Executive Director, Product Specialist, Equity, UBS Global Wealth Management
- 10:00 am** **Asset Classes: Introduction and an Overview of Fixed Income**
- Terence Yu**
Executive Director, Product Specialist, Fixed Income, UBS Global Wealth Management
- 10:30 am** **Asset Classes: Foreign Exchange: what next for the USD?**
- 11:15 am** **Break**
- 11:30 am** **Asset Classes: Lombard Lending and Cash Solutions**
- Vincent Leung**
Executive Director, Product Specialist, Lombard & Banking, UBS Global Wealth Management
- 12:00 pm** **Asset Classes: Introduction and an Overview of Investment Funds & Hedge Funds**
- Paula Ip**
Executive Director, Head of Investment Funds, Greater China, UBS Global Wealth Management
- 12:30 pm** **Lunch at UBS Office**
- 13:30 pm** **Portfolio Hackathon part 1**
Group work: Construct a portfolio base on what's been learnt on asset classes
- *Participant's CA to assist afternoon session by nomination (13:30 – 18:00)*
- 15:00 pm** **Presentation Task**
Group work: Each group will present their portfolio project with the investment mandate
- 16:00 pm** **Break**
- 16:15 pm** **ESG: Sustainable and Impact Investing for family wealth**
- Mario Knoepfel**
Director, Sustainable and Impact Investing APAC, UBS Global Wealth Management
- 17:00 pm** **Portfolio Hackathon part 2**
Group work: Construct a portfolio incorporate ESG and Sustainability concepts into the constructed Portfolio
- 18:00 pm** **Program concludes for Day 2**

Day 3 – Wednesday, July 15, 2020**09:30 am****Registration****10:00 am****Idea generation with Design Thinking**

Learn how to come up with innovative yet practical business ideas as a team through the core thinking funnel of Design Thinking.

Gary Lo

Managing Director and Principal Instructor
Glo Consulting

11:30 am**Building a Business Pitch with Storytelling**

Use the storytelling framework of various Fortune 500 companies and top management consulting firms to build a solid and convincing pitch for your business idea.

12:30 pm**Lunch at UBS office****14:00 pm****Pitch like a TED Talk Professional**

Enhance your engagement with the audience and your presence on stage leveraging on effective presentation skills, creating a stronger impression and impact for your pitch. A good opportunity to learn the skills from the trainer with TED Talk experience to boost your pitching confidence.

Business Case Preparation

Based on everything learnt in the morning, each group will formulate a comprehensive business case that they need to pitch to the judges.

Final Pitch Presentation

Each team will be given 7 minutes to present their ideas and research to a panel with a 3 minute Q&A session. An award will be given to the best team at final day of program. The presentation will be judged on:

- Quality of the presenters
- Creativity of the idea
- Overall persuasiveness of the pitch

18:00 pm**Program concludes for Day 3**

Day 4 – Thursday, July 16, 2020**09:00 am****Registration****09:30 am****Understanding your legacy: Family Office and Wealth Succession**

A session to learn about what Family Offices are, how families plan their wealth succession across generations, how investment decision are made and how they can transform and keep up with modern trends. We will also explore enterprise's investment strategy from the perspectives of impact investing, philanthropy, as well as venture capital investment.

Peter Lee

Executive Director, UBS Family Advisory, Asia Pacific
UBS Global Wealth Management

11:00 am**Private Market and Private Equity vs Public Market****Pak-Seng Lai**

Managing Director, Head of Private Markets APAC
UBS Global Wealth Management

11:30 am**Artificial Intelligence: Innovation and Entrepreneurship**

PWC estimated that the global GDP will be 14% higher and 30% of the current jobs will be gone by 2030 because of A.I. A.I. is extremely significant to the growth and survival of any businesses on earth. We will explore how to seize this unprecedented opportunity and manage the challenges through corporate innovation and startup entrepreneurship.

Dr. Toa Charm

Former Senior Management: Cyberport, HSBC, IBM and Oracle
Chairman, OpenCertHub
Associate Professor, CUHK Business School

Fireside chat with A.I. Start-ups**Viola Lam**

Founder & CEO,
Find Solution A.I

Kinni Mew

Founder,
Mindlayer

13:00 pm**Lunch at UBS office****14:00 pm****Finding your passion: Discover your passion and aspirational long-term goal**

Uncover your inner drives and essential elements that motivate you at work. You will learn to connect the dots and find your real passions to identify an aspiration career for yourself.

Strategic Career Planning: Define a clear Career Path and Objective

Take stock of where you stand by rethinking your career goals, areas of focus, path to success and learn how to strategically plan your career to fulfil your longer term aspirations.

Gary Lo

Managing Director and Principal Instructor
Glo Consulting

17:00 pm**Program concludes for Day 4**

Day 5 – Friday, July 17, 2020**09:00 am****Registration****09:30 am****Polishing your CV and interviewing skills**

How should you approach CV writing? What do hiring managers look for in the CV? What usually will hiring managers ask during job interviews? Learning the skills will help you better equip yourself, and understand your strengths / weaknesses and matching them with your jobs.

Yvonne Sall

Director, Recruitment Team Lead, Hong Kong
UBS Global Wealth Management

**Participants to bring their resume for on-site editing*

**Participant's CA to assist session by nomination*

11:30 am**Career panel with Banking Professionals**

Interested in working in the banking industry for one of the global leading banks? Meet our banking professionals from cross divisions who might just give you that winning edge to break into the private banking industry.

12:30 pm**LEADS Advance 2020 Graduation Ceremony**

Award presentation for Business Case Pitch Presentation & Certificate Presentation

** Participant's CA compulsory to join.*

** Participant's parents welcome to join at wish*

13:15 pm**Wrap Up and End of UBS LEADS Advance 2020**