

UBS LEADS Certification Program 2023

Program

UBS LEADS Certification Program is an exclusive and unique event for the next generation of UBS Wealth Management clients. The program is designed to equip participants with the necessary skills to be effective leaders of tomorrow. Aimed at university graduates and undergraduates of any academic background and between the ages of 18 and 25 years old, UBS LEADS Certification Program promises to offer excellent opportunities to heighten self-awareness, enhance financial knowledge, develop inter-personal and leadership skills, and to network with peers.

This 4-day program will be held in Hong Kong. Conducted in English, the program will actively engage participants through interactive workshops, game simulations, group discussions, role plays and career advisory forums. 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 17, 2023 (Monday)	13:00pm – 18:30pm
July 18, 2023 (Tuesday)	09:00am – 16:30pm
July 19, 2023 (Wednesday)	09:00am – 18:30pm
July 20, 2023 (Thursday)	09:00am – 18:00pm

Program Format

Physical attendance

Program Location

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

Dress Code

Smart Casual
Day 3 | Please wear comfortable shoes for offsite activities

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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Program Supervisor

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Day 1 – Monday, July 17, 2023

- 13:00 pm** **Registration**
- 13:30 pm** **Welcome Address**
- Shirley Siu**
Head of Marketing, UBS GWM Chief Marketing Office, Greater China
- 13:40 pm** **Ice Breaking**
- Carter Wong**
Sales Manager, GWM Advisory & Sales and Client Services Greater China
- 13:55 pm** **UBS overview**
An introduction of UBS of its 160-year heritage and how UBS combines wealth management, investment banking and asset management businesses with our Swiss operations to deliver superior financial solutions.
- Jamee Wong**
Head, Private Client, Greater China, UBS Global Wealth Management
- 14:10 pm** **Chief Investment Office: Asset Allocation overview**
- Crystal Zhao**
Head of Global Cross Assets, UBS GWM, CIO
- 14:40 pm** **Networking Break**
- 15:15 pm** **Portfolio Management Simulation**
Participants will work in groups to formulate and work on strategic asset allocation to achieve long term investment objective(s). The session aims to give participants an understanding of the theoretical background and experience the practices of portfolio construction whereby the investment objective of an investor may be achieved. Best performed groups will be awarded with trophies at program end.
- Dr. Ronald K Chung**
Managing Director
EQuity Consulting Co., Ltd
- 18:30 pm** **Program concludes for Day 1**

Day 2 – Tuesday, July 18, 2023

- 09:00 am** **Registration**
- 09:30 am** **UBS division: Introduction of Investment Banking**

John Lee, Vice Chairman, Head of Greater China, UBS Global Banking
- 09:40 am** **UBS division: Introduction of Asset Management**

Chris Yiu, Deputy Head of UBS Asset Management Hong Kong, Head of Wholesale Client Coverage Hong Kong
- 09:50 am** **How could young entrepreneurs be empowered by Generative AI?**
As Artificial Intelligence advances in an unprecedented way, does its latest application like ChatGPT really serve and enhance human life well or indeed posing unforeseeable challenges to the workforce and society? How could we empower the younger generations' entrepreneurial mindset with Generative AI?

Joseph Chan, Programme Lead – Entrepreneurship, Design & Innovation, The University of Hong Kong; Associate Director of Centre for Innovation and Entrepreneurship

Connie Leung, Regional Business Lead - Asia, Worldwide Financial Services, Microsoft

Moderator: Neil Yiu, Head of Global Wealth Management Corporate Finance, Asia-Pacific, UBS
- 10:30 am** **UBS Circle One**
A live demonstration of UBS Circle One, the new digital platform that connect clients to experts, top insights and actionable ideas.
- 10:50 am** **Networking Break**
- 11:15 am** **Carrying the Torch: Passing on a lasting family legacy to future generations**
An introduction of Family Advisory, specializes on wealth continuity with a focus on Family Strategy, Family Governance and Family Office Setups. The session will cover the development of family constitutions, the setup or review of family office arrangements and the leadership development of next generation family members.

Andrew Lo
Head of Family Advisory & Family Office Solutions, UBS GWM
- 11:45 am** **Family Office panel discussion**
- 12:30 pm** **Networking lunch at UBS office with Family Office panelists**
- 14:30 pm** **“Reputation matters” Workshop**
Participants will learn practical strategies for building and maintaining a strong reputation, including crafting a personal brand and creating lasting impact.

Clara Shek
President, Hong Kong and Asia Corporate Reputation Practice Lead
Ogilvy Public Relations Worldwide Limited
- 16:30 pm** **Program concludes for Day 2**

Day 3 – Wednesday, July 19, 2023

- 09:00 am** **Registration**
- 09:15 am** **Building an effective Business Pitch**
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.
- Gary Lo**
Managing Director and Principal Instructor
Glo Consulting
- 10:45 am** **Networking Break**
- 11:00 am** **Effective Presentation Skills – speak 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.
- Gary Lo**
Managing Director and Principal Instructor
Glo Consulting
- 12:15 pm** **Lunch**
- 14:00 pm** **Coach travel to Dark and Silence Experience Workshop @ D2 Place**
- 14:30 pm** **Dark and Silence Experience Workshop for Leadership**
It takes a team to build a leader. An effective leader has to be open-minded and be able to understand teammate’s perspectives to improve team dynamics. Collaborate with visually impaired and deaf trainers to develop your awareness towards individual differences in this workshop.
- Louis Hou**
Chief Executive Officer
Dialogue In the Dark (HK) Foundation Limited
7B, D2 Place One, Cheung Yee Street, Cheung Sha Wan
- 18:00 pm** **Coach travel to One Peking, Tsim Sha Tsui**
- 18:30 pm** **Program concludes for Day 3**

Day 4 – Thursday, July 20, 2023

09:00 am	Registration
09:30 am	Empathy for Style Preference: Work preference profiling tool Empathy for Style Preference is an interactive card-based activity to improve your teams' self-awareness and by raising your empathy for other communication and creativity styles. This in turn builds trust by creating a common language. Skip Swanson Koru Consulting Limited
10:45 am	Networking Break
11:00 am	ESG: Sustainable and Impact Investing for family wealth "Sustainability", "ESG" have become buzzwords in recent years, Next Gens appreciate the growth of sustainable investment vehicles, yet to push for greater transparency so they can make well-informed investment decisions aligned with their impact values and goals. This session shares trends and perspectives to support your investments in Sustainable and Impact Investing. Mario Knoepfel Head Sustainable Investing Advisory, Asia-Pacific, UBS Global Wealth Management Amanda Gu Sustainable Finance Graduate Trainee, CIO APAC
11:30 am	Impactful Philanthropy Discuss about what is impact and why is impactful philanthropy important. The session will make use of UBS Optimus Foundation as a showcase to illustrate how we make use of different funding approach to achieve the maximum impact in our strategy, why collaboration matters and how does a structured approach to philanthropy could bring about real changes to societal and environmental problems. Ellen Yip Philanthropy Advisor, Social Impact and Philanthropy, Greater China
11:45 am	Networking Lunch at UBS office
13:15 pm	The 2030 SDGs Game: Connecting purposes to the Sustainable Development Goals The 2030 SDGs Game is a highly interactive simulation, that allows participants a chance to experience how their decisions can impact the world positively or negatively, from now until 2030. A rich debrief draws out the powerful learnings from the simulation. Skip Swanson Koru Consulting Limited
15:45 pm	Feedback
16:00 pm	Celebration cocktail @ 1881 Heritage Certificate and Award Presentation It's time to celebrate your graduation of LEADS Program 2023 and network with your peers at a relaxing venue in 1881 Heritage. Venue: Courtyard @ House 1881 Heritage, 2A Canton Road, Tsim Sha Tsui
18:30 pm	End of LEADS Certification Program 2023