



UBS Leadership Excellence and Development Series (UBS LEADS) Certification Program

3-5 July 2023

Program Highlights

- Gain **leading edge knowledge** and actionable strategies to shape future roles
- Develop a skill set to thrive as future family business leaders or stewards of substantial financial wealth through a **3-part Next Gen DNA series**
- Learn how to develop a **Minimum Viable Product (MVP)** and refine their business idea to attract investors.
- Exchange **experiences** and **insights** in a curated environment
- Find inspiration, reflect on personal stories, and **explore** own future paths
- **Grow a network** and friendships with like-minded peers and thought leaders

Venue: UBS University, 9 Penang Road, Singapore 238459

Dress code: Smart casual (for all days), comfortable walking shoes for offsite team building activity on 3 July.

Parking: Full day parking coupons are available upon request at UBS University

UBS LEADS day 1: Monday, 3 July 2023

08:30 Arrival & Breakfast (sit-down)



09:00 Being the CEO of your career

Patricia Quek, IBF Fellow, Business Sector Head, Singapore and Malaysia, UBS GWM

09:10 Ice Breaker

Albert King, Facilitator, WAND Inspiration Network Pte Ltd

09:40 Coffee break



10:00 Applying economic theories to the real world

Speaker: **Kelvin Tay**, Chief Investment Officer, South Asia Pacific, UBS GWM

11:00 Philanthropy: If you really want to make a difference, why not now?



Speaker: **Julia Windasari Tan**, Advisor- Board of Director, doctorSHARE

Moderator: **Dickson Lim**, Head of Philanthropy & Community Impact, Singapore, UBS AG

11:45 A snapshot on Asset classes: Equities, Foreign Exchange, Fixed Income & Alternatives

Speaker: **Bryan Teoh**, Circle One APAC Content Lead, UBS GWM

12:15 Lunch & Connect with your UBS Client Advisor

14:00 Group photo

14:30 Circle One by UBS

Speakers:

Michele Lim, Circle One by UBS APAC Head, UBS GWM

Carina Gozali, Circle One by UBS, Digital Content Specialist, UBS GWM

15:00 UBS SUPER: Owning your career

Speaker: **Shalini Jalan**, Head of People and Culture Singapore, UBS SG

15:30 Coffee break



15:45 What is it about Endowment style investing?

Speakers:

Cheryl Ong, Sales Manager, UBS GWM

Oliver Kaderabek, Head A&S Investment Specialists SEA, UBS GWM

16:15 Sustainable food production: What's new on the menu?



Speakers:

Aparna Venkatesh, Collaborative Innovation Lead, Bühler Group

Wayne Gordon, CIO Cross-Asset and Commodity Strategist, Chief Investment Office, UBS GWM

Valerie Lau, Co-Head Sustainable Finance APAC, UBS AG

16:45 Transfer to National Gallery



17:00 – Team building activity: True Lies Escape Game, followed by light bites.
20:00 *Venue:* National Gallery, 1 St Andrew's Road, Singapore 178957

20:15 Drop-off at Swissôtel The Stamford

UBS LEADS day 2: Tuesday, 4 July 2023

09:00 Arrival, check-in, buffet breakfast



09:30 An entrepreneur's journey: From banking to fintech

Speaker: **Jason Tay**, Head of Business Development, Head of Government Relations, M-DAQ Global

Moderator: **Joy Lim**, Market Team Head, Singapore, UBS GWM

10:15 Building your MVP: Attracting investors

Speaker: **Kathryn Rungrueng**, Executive Director and Chief of Staff for the Chief Digital Information Office (CDIO), APAC at UBS

11:00 Coffee break



11:15 Building your MVP workshop: Taking ideas into reality

Speaker: **Peter Kirkaldy**, Director, APAC CDIO Strategic Initiatives, UBS

12:00 Lunch



14:00 Securing your family legacy for generations

Speaker: **Tan Lay Peng**, Head of A&S Family Advisory & Client Development SEA and Family Office Competency Center, UBS GWM

14:30 Next Generation DNA Part 1: Family business system

Next Generation DNA Part 2: Succession

Speaker: **Dr. Marta Widz**, Educator, Researcher & Advisor for Family Businesses and Family Offices

Coffee break in between the series 

17:30 [Optional] Art tour in UBS office by **Shao Hui Kwok**, UBS Art Collection Specialist APAC

UBS LEADS day 3: Wednesday, 5 July 2023

08:30 Arrival, check-in, buffet breakfast



09:00 Next Generation DNA Part 3: Stewardship and sustainability

Speaker: **Dr. Marta Widz**, Educator, Researcher & Advisor for Family Businesses and Family Offices

10:10 Why Venture Capital: Entrepreneurship is the best way to uplift people and economies around the world

Speaker: **Saemin Ahn**, Partner, 500 Global, Southeast Asia

Moderator: **Conrad Huber**, Head of Greater China Singapore, Indonesia & Japan International, UBS GWM

11:00 Returning home: a panel discussion with the next generation

Speakers:

Sim Mong Teck, Founder and Managing Partner, Sim Mong Teck & Partners

Simone Sim, Head, Family Office Concierge Service, SMTP Consult Pte Ltd

Moderator: **Dr. Marta Widz**, Educator, Researcher & Advisor for Family Businesses and Family Offices

11:30 Wrap up: Insights & Reflections

11:40 Transfer to lunch venue



12:00 –
14:00 Graduation Lunch



Host: **Patricia Quek**, IBF Fellow, Business Sector Head, Singapore and Malaysia, UBS GWM

Venue: Grand Shanghai, 360 Havelock Road, King's Centre, Level 1, Singapore 169662