

# ELIFT FORUM

a dynamic platform for emerging leaders  
in finance & treasury

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RISING FINTECH STAR





# AGENDA

<b>08:30</b>	<b>Connect and Fuel</b> Exhibition opens with refreshments to connect with colleagues and meet new peers
<b>09:30</b>	<b>Welcome</b> <b>David BLAIR, Managing Director, Acarate</b>  <b>Alan LIN, Global Head of Cash Management, Transaction Banking, Standard Chartered Bank</b>
<b>09:40</b>	<b>The NextGen Treasury – Transform and Triumph</b>  <b>Alternative Data Shaping Investment Strategies</b> Rising star and NextGen business leader from Columbia University Business School shares his uplifting story. Fondly known as <i>Dr. Big Data</i> he sets a backdrop using technology tools to shape investment strategies and the future finance landscape. An inspiration and role model for ELIFT – Emerging Leaders In Finance & Treasury. <b>Presentation</b> <b>Benoît BROOKENS III (Dr. Big Data), CEO and Founder, Accrue</b>  <b>Transforming Cloud-based Solutions for NextGen Treasury</b> The growing responsibilities of the modern CFO and treasurer include providing organizational direction and strategic insight which has increased the reliance on treasury teams to provide a clear, accurate view of the organization's cash, liquidity, and risk. Using cloud-based technology, treasury teams can increase their productivity, standardize formats & processes, and mitigate overall risk. Further, new technology lays a foundation for Next Generation Technology, such as Robotic Process Automation and Artificial Intelligence, to empower treasury teams in the future. <b>Presentation</b> <b>JaeSon KIM, Managing Director, Asia Pacific, Kyriba</b>
<b>10:20</b>	<b>Using APIs and Real-time Banking to Drive New Business Solutions</b> Treasurers are increasingly being approached by their business colleagues to help develop solutions to support new business channels and services. Much of this change is focused on online, real-time and mobile commerce services. In this session we look at a series of real-life case studies with clients who have used a combination of new technology including APIs, instant payments, real-time FX engines, QR codes, and other banking technology to power a range of innovative and new business solutions across insurance, marketing, subscription services, retail e-commerce and payment services to drive delivery of real-time solutions that have changed the customer landscape. <b>Presentation</b> <b>Peter KLEIN, Head of Cash Management, Technology, Finlync</b> <b>Panel</b> <b>Peter KLEIN</b>

	<b>Martijn DE JONG, Co-Head, Digital Channels &amp; Data Analytics, Corporate, Commercial &amp; Institutional Banking, Standard Chartered Bank</b> <b>Desmond ONG, Head of Digital Channel Market Management and Open Banking, Treasury Services, Asia Pacific, J.P. Morgan</b>
<b>11:00</b>	<b>Refuel - Morning break</b>
<b>11:30</b>	<b>Defining Digital the Treasury Way</b> Treasury has always been about data and much of that data has been digital for years, so what exactly does it mean to talk about treasury digitalisation? For some, it is the use of better technology (e.g. Cloud) to integrate or replace legacy systems with real-time, straight-through processes. For others it is the application of emerging technologies in robotics, and real time banking solutions to deliver the next level of efficiency and strategic insight. And for others, the truly digital treasury is one fully integrated into the wider business information ecosystem in the company, enabling enhanced decision-making not just around the core treasury mandate, to optimise financial assets and liabilities, drive cash flow improvements, process cash transactions and manage financial risk, but across the whole company. <b>Presentation</b> <b>Byron GARDINER, Global Head, Treasury Solutions and Advisory, Transaction Banking, Standard Chartered Bank</b> <b>Panel</b> <b>Byron GARDINER</b> <b>Rishi MEHRA, Financial Controller Asia Pacific, AON</b> <b>Marcia UY, Director, Commercial Treasury, Rio Tinto</b>
<b>12:10</b>	<b>Guided demo tour – hands on experiences with experts and peers</b>
<b>12:45</b>	<b>Connect and Fuel - Lunch</b>
<b>14:00</b>	<b>Blockchain in Treasury</b> From the 101 picture on Distributed Ledger and personal observation on how China is using Blockchain technology, CF sees 3 main areas whereby Blockchain can be deployed in Treasury. (i) Payments (ii) Trade Finance (iii) Procurement & Supply Chain. Why these 3 areas? For any Blockchain business solutions to work, there must be collaboration among the players. These are the areas of work whereby there are many inefficiencies in work processes, much paperwork, long processing lead time, staff performing non-value-add activities etc. The incentive for collaboration is huge for these players as this is part of their digitalisation journey. Are Blockchain applications here to stay? And what are his views on Cryptocurrency for Treasury? <b>Presentation</b> <b>CF WONG, Head of Finance, GP Electronics</b> <b>Panel</b> <b>CF WONG</b> <b>Steven HO, Contract Logistics, Director SE Asia, TVS Asianics</b> <b>Naveen MALLELA, Head of Digital Treasury Services, Asia Pacific, J.P. Morgan</b>

<b>14:40</b>	<b>Fintech Benchmarking to Unlock Value for Treasurers</b> An interactive participation from audience to benchmark their digital journey, the gains and experiences they face and is there a “blue sky” scenario.
<b>15:00</b>	<b>Refuel – Afternoon break</b>
<b>15:30</b>	<b>Maximize Talents for NextGen Business Leaders</b> In our competitive and technology-driven business environment, the smartest and best-equipped professionals will become our NextGen business leaders. Further education and ongoing training are now part of the equation for building a successful and fulfilling career, adding value to family, team and company.  <b>AI Impact on Future Finance and Treasury</b> AI has been used to develop and advance numerous fields and industries. From a multitude of disruptive technologies that you are confronted with, how does AI help in your finance and treasury functions? <b>Presentation</b> <b>Dr. TEOH Teik Toe, Senior Lecturer &amp; Academic Director of Nanyang Business School, Nanyang Technological University</b>
<b>15:50</b>	<b>Mystery Prizes &amp; Close of Forum</b>
<b>16:00</b>	<b>Masterclass: Real-time Banking Solutions for Corporates</b> Joins us for a practical session explaining how real-time banking solutions can improve your customer experience <ul style="list-style-type: none"> <li>• Learn about applicability of QR codes: What is the right implementation model for your company</li> <li>• Live use cases of how API banking and above solutions can impact your business model</li> <li>• Managing a multi-bank treasury with consolidated balance view and automated smart funding</li> <li>• Roundtable discussion: Embracing the new digital norm – Hype vs. reality</li> </ul> <b>Conducted by</b> <b>Ankur KANWAR, Regional Head of Cash Management Products, ASEAN and South Asia, Standard Chartered Bank</b> <b>Ray SHUN, Cash Management Product Director, Standard Chartered Bank</b>
<b>17:00</b>	<b>Close of Masterclass</b>



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**REGISTRATION ENQUIRY:** Melinda SHAW | Events Manager, ATC | [atc@atc.asia](mailto:atc@atc.asia)

## FORUM CHAIR



**David BLAIR, Managing Director, Acarate**

With more than 25 years of management and treasury experience in global companies, David Blair was formerly vice-president treasury at Huawei where he drove a treasury transformation for this fast-growing Chinese infocomm equipment supplier. Before that David was group treasurer of Nokia, where he built one of the most respected treasury organisations in the world. He has previous experience with ABB, PriceWaterhouse, and Cargill. David has extensive experience managing global and diverse treasury teams, as well as playing a leading role in e-commerce standard development and in professional associations. At Acarate Consulting he specialises in treasury and financial advice to corporates, banks and government.

## WELCOME ADDRESS



**Alan LIN, Global Head of Cash Management, Transaction Banking, Standard Chartered Bank**

Alan is the Global Head of Cash Management, Transaction Banking at Standard Chartered Bank. Alan is a banking veteran with 26 years of banking experience predominately in Transaction Banking. Prior to joining Standard Chartered Bank, Alan was the Greater China Head for Treasury and Trade Solutions at Citibank.

In his career with Citibank, Alan had held global positions in New York as Global Solutions Head for Payments and Receivables and Global Head of Receivables. Other key leadership roles he had held include China Global Transaction Bank Head, Singapore Trade Head, Asia Pacific Regional Head of Receivables.

Alan first started his banking career with Philadelphia National Bank (now Wells Fargo Bank after few merges) as a relationship manager for Financial Institution in Taipei, Taiwan.

## SPEAKERS



**Benoît BROOKENS III (Dr. Big Data), CEO and Founder, Accrue**

Benoît is the CEO and Founder of Accrue, a very large database and machine intelligence company that is building the Almanac™ for global event analytics across industries. He is affectionally known as Dr. Big Data and notably participated in the World's First Data Scientist Summit in 2011.

Benoît had an early start in technology, learning to type before he could write. A successful participant of the M.I.T. Media Lab's program, he was programming by



the age of four. Founding his first data company at 14, he pioneered multiple-class IP web hosting creating a breakthrough for internet marketers in the Google PageRank algorithm. As a young web developer, he built websites for the US Congress, Universal Music Group, and Vespa. At age 20, he became the youngest FX asset manager at Dukascopy Bank in Geneva, Switzerland and was ahead of the alternative data science industry leveraging algorithms on new datasets that materialized on the internet during the 2000s decade.

Benoît is a graduate from the Columbia University Business School. In 2016, the UK Government and the London Stock Exchange recognized Accrue as one of the World's Most Promising FinTech Companies.



**Byron GARDINER, Global Head, Treasury Solutions and Advisory, Transaction Banking, Standard Chartered Bank**

Byron has over 20 years of international treasury experience, the last 17 years of which have been focused primarily on the Asia Pacific region. On the practitioner side, Byron has established and led APAC treasury teams for Oracle and Symantec. In a prior role, he was a treasury director at Huawei Technologies, where he was responsible for transforming the company's global treasury operations. Byron has also

held senior positions with Merrill Lynch Treasury in London and with ANZ Banking Group in Sydney.

His experience extends to the set-up of IHB, RTC, SSC, and Payment Factory operations, and the creation of sophisticated regional and global liquidity management structures. In his current role, Byron has hosted over 150 workshops and best practices sharing sessions for clients of Standard Chartered. He was the back-to-back recipient of the 2015 and 2016 Corporate Treasurer Marquee Award 'Best Treasury Consultant in Asia'.

The primary focus of his many successful client advisory engagements has been bank account rationalisation, cash and liquidity management optimisation, working capital optimisation, and a variety of Treasury Transformation and Centralisation projects including IHB models. More recently, he has been targeting opportunities for clients to leverage many of the evolving digitisation and innovation initiatives across both cash and trade landscapes.



**CF WONG, Head of Finance, GP Electronics**

CF is currently the Head of Finance for GP Electronics (HK) Limited, a wholly owned subsidiary of GP Industries Limited, a company listed on the Mainboard of the Singapore Exchange Securities Trading Limited. He is the overall Project Leader for successfully implementing the IBM Cognos Controller software for GP Industries Limited group of 70 subsidiaries. He is a key member of the executive management

committee for GP Industries Limited, Electronics Division. Prior to this, CF held senior positions including Head of Finance in multinational and listed companies, where he led cross-cultural teams that spanned from the United Kingdom, Germany, Italy, USA, China, Hong Kong and Singapore. He has also previously worked in the Big Four international auditing firms.

CF has over 20 years of extensive experience covering stakeholder engagements, business partnering, strategic planning and evaluation, mergers & acquisition, financial & treasury FX management, tax strategy, audit, consolidation, financial and management reporting.

He also has considerable experience in setting up or winding down operations, implementing internal control systems, automating to maximise operational efficiency and reducing listed Company month-end reporting timeline.

CF holds an Executive MBA from the Kellogg-HKUST and is a Bachelor of Accountancy (Honours) graduate from the Nanyang Technological University, Singapore. He has also attended the Financial Talent (F-TEN) Leadership Executive Programme jointly organized by the Singapore Management University and Institute of Chartered Accountants in England and Wales (ICAEW). He is a regular speaker at public seminars and lectures at HK Universities.



**Desmond ONG, Head of Digital Channel Market Management and Open Banking, Treasury Services, Asia Pacific, J.P. Morgan**

Desmond Ong is Head of Digital Channels Market Management and Open Banking, Asia Pacific, for J.P. Morgan, driving the channel and client integration products for Treasury Services. He is responsible for all key functions, including strategy, sales, product development, client service and solution implementation. Desmond partners closely with the firm's local, regional and global teams to deliver channel market-leading

solutions to its clients.

Desmond joined J.P. Morgan in 2013 after 10 years at Citi, where he held several roles across technology and implementation. Prior to joining J.P. Morgan, he was regional Electronic Banking Service head for Citi's transaction bank in Asia Pacific. He started his career at Singapore Airlines in various roles in the IT Department. Desmond holds a Bachelor of Engineering (Electronic and Electrical) degree from Nanyang Technological University (Singapore).



**JaeSon KIM, Managing Director, Asia Pacific, Kyriba**

JaeSon is responsible for driving and optimizing regional treasury transformation in corporates of all types and size through the delivery of Kyriba's leading cloud-based treasury management solution. Prior to joining Kyriba, JaeSon managed Thomson Reuters' global taxation business in Asia. He brings over 20 years of global experience in SaaS/cloud-based liquidity management, global taxation and financial process transformation enterprise software. JaeSon started his career as

a financial software engineer having graduated from Brown and Stanford Universities with distinctions in Applied Mathematics, Business Economics and Computer Science respectively.



**Marcia UY, Director, Commercial Treasury, Rio Tinto**

Marcia joined Rio Tinto on 16th January 2017 bringing with her over 17 years of Global/Group Corporate Finance & Treasury Management experience. She led the establishment of the new centralised global treasury operations and cash management organisation in Singapore responsible for:

- Cash, Funding & Liquidity Management in 65 countries for over 80 business entities.
- In House Banking services in over 15 currencies and managing over USD 6.4 billion in payments.
- Embedding treasury as a valuable business partner and SME for driving efficiencies in end to end P2P & C2C global processes.

Delivered through one Treasury Management system, one Shared Service in India, one Global Treasury Centre in Singapore, creating a more streamlined global structure comprised of only 12 FTE, an estimated reduction of 50%.

Prior to Rio Tinto she was Asia Treasurer for GE's USD 3 Bln Healthcare business covering 15 countries and 30 operating units advising regional CFOs on FX risk management, working capital efficiency and M&A deal execution. At Royal Dutch Shell for 15 years, she headed the Markets Execution Team of Shell Treasury Centre East (STCE), building a multi-cultural team of 8 dealers.

Thereafter, as STCE Head of Operations she led the Front, Middle, Back office and Cash Management teams responsible for the day to day high risk operations in the region covering 18 countries, over 50 business units with annual turnover in excess of USD800Bln. Prior to that, she was budget analyst for the City of New York under Mayor David Dinkins, the first and to date only African American to hold that office. An MBA Graduate and affiliate member of the Association of Corporate Treasurers obtaining a Certificate in International Treasury Management in 2010. Lived, studied and worked in 7 different countries, is married with 3 children.



**Martijn DE JONG, Co-Head, Digital Channels & Data Analytics, Corporate, Commercial & Institutional Banking, Standard Chartered Bank**

Martijn is the Co-Head of CCIB Digital Channels and Data Analytics, a global team that brings together our Digital Channels and Client Data Analytics capabilities within a dedicated Centre of Expertise.

His key responsibilities are to deliver an integrated one-firm, client-centric single portal to create a frictionless client digital channel experience, deliver our open banking strategy and to leverage and monetize data.

Before this role, Martijn was the Global Head of Digital, Data & Platforms. In this role, he was responsible for leading Transaction Banking division's digital, data and innovation agenda, which is defined as one of the bank's top priorities.

Prior to joining Standard Chartered, Martijn was Chief Digital & Marketing Officer for global insurer Aegon where he developed their ecosystem and platform strategy. Martijn has a 20-year career in leadership roles in financial services and telecoms, specialising in product innovation, platform strategy, ecommerce and analytics.

Martijn holds a master's degree in International Economics from Maastricht University and is a Harvard Business School alumnus.





**Naveen MALLELA, Head of Digital Treasury Services, Asia Pacific, J.P. Morgan Chase**

Based in Singapore, Naveen Mallela is an Executive Director with J.P. Morgan's Treasury Services team and is currently leading the "Digital" function in Asia Pacific. His responsibilities span Blockchain, AI, Analytics, Crypto-Assets strategy and FinTech partnerships.

Previously for the last 2 years, Naveen led Emerging Technologies as part of the CIB Banking Technology team in APAC and led several critical innovation proofs of concept and pilots, including Project Ubin with the Monetary Authority of Singapore, an industry effort to use Distributed Ledger Technology for the clearing and settlement of payments and securities.

Prior to joining J.P. Morgan, he was a Partner at Infosys Consulting, a global consulting firm advising companies on strategy and IT transformation, with a remit for Japan, U.K. and Singapore.

Naveen is also a certified Chartered Financial Analyst from the CFA Institute, and holds an MBA from Indian Institute of Management Bangalore (IIMB).



**Peter KLEIN, Head of Cash Management, Technology, Finlync**

Peter is responsible for the full suite of cash management applications and ERP connectivity. He has 20+ years of experience advising and driving digital transformation with Fortune 500 clients through integrated ERP system enablement. Peter serves both Corporate clients and their Banking partners, with a focus on secure and API-driven connectivity, fully integrating the banking experience within the native ERP system.

Peter has a proven track record of architecting leading-edge cash management processes for the world's largest Corporates, and he has implemented end-to-end Treasury Management Systems for SAP and ERP. Peter believes in an outcome-focused approach, keeping business KPIs as the north star. whether the value drivers are cost-reduction, faster transactions or advanced cash visibility and liquidity control.

Peter is viewed as a thought leader in ERP cash management, publishing numerous articles on the industry, most recently on "How to Leverage Instant Payments, and the Role of APIs". He is a regular speaker at Cash Management, FinTech and Treasury conferences, with a passion for unlocking value through a more intimate corporate-bank relationship.



**Rishi MEHRA, Financial Controller Asia Pacific. AON**

Rishi is the Regional Controller for Aon Asia Pacific. He has been in this current role as Financial Controller, Asia Pacific for 6+ years and has been with the Aon Group for over 15 years. Rishi has held various leadership roles in Singapore and India. He commenced his career with PwC and worked with PepsiCo; before joining Aon. Rishi is a finance executive with experience in all aspects of Accounting, Auditing and

Financial Management. Rishi also has expertise in Controllershship, Business Planning (strategic & operational), Restructuring, FP&A, Management reporting, Efficiency & Automation. He possesses a good working knowledge on process re-engineering, systems implementation, M&A and Re-structuring.

Graduated in Commerce & Accountancy (Bangalore University, India), Rishi is a member of the Institute of Chartered Accountants in India. Ongoing development includes the Diploma in SW Engineering, F-Ten and the Aon Global Leadership programs with Booth School University of Chicago.



**Steven HO, Contract Logistics, Director SE Asia, TVS Asianics**

Steven has more than 25 years' experience in a regional and global finance role with local corporates and multinationals including TNT International Express and Neptune Orient Lines. Now as Finance Director of TVS Asianics, his responsibilities go beyond the delivery of data and results to the interpretation of information and contributing towards decision-making activities. He believes it is more eminent that he has to equip himself with the appropriate skills as a business strategic enabler to

provide adequate business insights.



**Dr. TEOH Teik Toe, Senior Lecturer & Academic Director of Nanyang Business School, Nanyang Technological University**

Dr. Teoh has more than 25 years' experience in Research and Software Development and has been teaching for 13 years. His professional credentials include 41 publications, Google Scholar H Index 4, co-founder of SUTD Luminaire, Luxury Mystery and MENSA member.

Equally impressive is his education background being Post Doctorate, Singapore University Technology & Design; PhD Computer Engineering, Nanyang Technological University; Doctorate of Business Administration, MBA University of Newcastle; Master of Science in Computer Engineering, Bachelor of Science in Electrical Engineering (Honors), University of Southern California; Master of Law (LLM), National University of Singapore; Master of Law (LLM), University of London; Bachelor of Law (LLB) 2<sup>nd</sup> Upper Honors, Birmingham City University; Master of Accounting & Finance, University of Gloucestershire; Bachelor of Psychology, University of Derby, CFA, ACCA (World Top 100); CIMA; Chartered Accountant Singapore; Chartered Accountant Malaysia; CPA Australia; Accredited Tax Practitioner Singapore.

Dr. Teoh's 2016 research project as Post Doctorate Research Fellow at the Singapore University Technology & Design is Artificial Intelligence – Deep Learning in Cyber Security lab. **Read more**

## MASTER CLASS CONDUCTED BY



**Ankur KANWAR, Regional Head of Cash Management Products, ASEAN and South Asia, Standard Chartered Bank**

Ankur is currently Regional Head of Cash Management Products leading strategy and execution for the Cash Management business across ASEAN and South Asia. Since joining Standard Chartered, he has worked with several large corporate clients on enhancing efficiency of their cash and treasury management operations. He has also been instrumental in launching a variety of innovative digital solutions and is a key influencer of new technology adoption in the industry. He is a regular speaker in various industry events and has also authored a number of thought leadership articles in broadsheets and reputed industry journals.

Prior to joining Standard Chartered Bank, Ankur worked for JP Morgan Chase in Singapore and New York. He led product management function for Transaction Banking regulatory products as well as worked extensively with large corporate clients streamlining their liquidity management structures.

Ankur is a seasoned banker with 18 years of experience in Transaction Banking, Treasury and Finance across markets in Asia and America. Ankur also has expertise in Treasury management leading Balance sheet hedging, funding strategies, engagement with capital and funding divisions as well as assessments for clients on regulatory changes.

He is a Chartered Accountant from India and also holds a Chartered Financial Analyst (CFA) qualification.



**Ray SHUN, Cash Management Director, Standard Chartered Bank**

Ray is currently Director of Cash Management Products based in Singapore, Standard Chartered Bank. In the past 15 years, Ray has been developing and implementing new cash management products for corporates of various scales - from local companies to multi-nationals.

With his extensive experience, he runs innovation workshops with corporates to revamp their customer journeys and to drive practical applications of the latest digital solutions in treasury management processes.

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## CORPORATE PROFILE



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**Kyriba** empowers financial leaders and their teams with award-winning solutions for cash and risk management, payments and supply chain finance. Kyriba delivers a highly secure, 100 percent SaaS enterprise platform, superior bank connectivity and a seamlessly integrated solution set for tackling today's most complex financial challenges. Thousands of companies, including many of the world's largest organizations, rely on Kyriba to streamline key processes, protect against loss from fraud and financial risk, and accelerate growth opportunities through improved decision support. Technology analyst firm IDC recognized Kyriba as a global leader in its MarketScape for SaaS and cloud-enabled treasury and risk management applications for 2017-2018. Kyriba is headquartered in San Diego, with offices in New York, Paris, London, Singapore, Tokyo, Dubai and other major locations. For more information, visit [www.kyriba.com](http://www.kyriba.com)



**Finlync** provides treasurers and cash managers with beautifully designed and seamless banking experiences fully embedded in their existing ERP System (SAP, Oracle, Dynamics). Headquartered in Singapore with a global presence, Finlync offers an ever-expanding suite of modular and API-driven cash management and treasury digital apps. The Result? Rapid adoption of powerful and ERP native banking experiences for treasurers and cash managers alike. [www.finlync.com](http://www.finlync.com)



Accrue

**Accrue** is a verb that means to gather and store, the Accrue Platform uses Artificial Intelligence to gather and store data to find optimal entry and exit points in the financial markets. Founded by a charismatic young entrepreneur from Columbia University Business School, Benoit Brookens III leads his team to build financial market software by making complex analytics feasible and taking nothing for granted. What gets measured gets improved. From Cloud Risk API, Real-time Almanac, Smart Screener and Chartist, Accrue provides seasonal opportunity analysis and event driven insights – combining decision support with Big Data. In 2016, the UK Government and the London Stock Exchange recognized Accrue as one of the World's Most Promising FinTech Companies. [www.accrue.com](http://www.accrue.com)



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Consistently counted among the world's top-tier business schools, we are one of the most established and comprehensive providers of business and management

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