Thailand Wealth Management Forum 2016

8.40am Registration

9.00am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.05am Head - to - Head Q & A

A new look and feel for global wealth management

Michael Benz
Senior Advisor
Synpulse

- What changes are we seeing in client expectations and behaviour?
- To what extent will fintechs really impact the wealth management industry?
- How will regulation re-shape private banking for good?

9.15am Panel Discussion

Wealth management in Thailand - onwards and upwards

- There is a growing amount of money available to penetrate in Thailand - how can we access it?
- Where are the opportunities emerging from proactive regulatory initiatives, such as efforts by the SEC to upgrade and internationalise the framework?
- What other measures would help the development of the market?
- How can we build a more holistic engagement as part of a more complete offering for clients, including advisory services?
- Where and how can we find more of the right people to deliver consistent and relevant advice to clients?
- Will the concept of private banking develop in Thailand? Especially to try and keep more money onshore and invested, rather than just held on deposit.
- What models and approaches have been successful elsewhere which can be applied in Thailand?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Vira-anong Chiranakhorn Phutrakul
Consumer Business Manager, Thailand Citi
Citi

Adisorn Sermchaiwong
Senior Executive Vice President, Head of Retail Banking Group
CIMB

Win Phromphaet
Vice President CFA Society of Thailand
CFA Institute

9.55am

Presentation
Volatility managed growth: equity-like returns but with less risk

Philip Lung
Managing Director, Division Head - Mellon Capital
BNY Mellon Investment Management

- Since the great financial crisis, investors have been keen to flee the damaging effects of volatility. However, that hasn't abated their need for growth
- For now, many investors have gravitated towards absolute-return strategies that advertise zero tolerance for negative return periods. But that comes at a price
- In contrast, a better approach might center on artfully managing long-term volatility (and tail risk) while positioning for growth-like returns

10.05am

Presentation
Will CRS really be - son of FATCA?

Dr. Angelo M Venardos
Director
Philadelphia

- Panic now or later?
- Hong Kong - from EOI to AEOI
- Singapore and Indonesia
- BVI

10.15am

Presentation
HNW insurance & wealth structuring is changing - here's how you and your HNW clients can benefit

David Varley
Head of High Net Worth - Asia
AXA

- One size doesn't fit all in the HNW marketplace
- Find out which HNW products match up with the differing needs of HNW clients
- By meeting your HNW clients' needs, you can secure more HNW clients, more revenue and more referrals

10.25am

Panel Discussion

Going digital - enhancing the engagement with customers

- What does digital mean in Thai wealth management?
- What more can we do? What are the possibilities?
- What role is there for digital platforms? How will these impact how products get sold, and the types of products offered going forward?
- What's the likely influence of robo-advisers and other fintechs?

- Do we have adequate tools to engage the customer - and help them become investors?
- How can we improve online mobile applications?
- Are there any consequences of falling behind in the digital race?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

John Robson
Chief Commercial Officer
Quantifeed

Patrick Donaldson
Head of Customer Strategy, APAC
LSEG

Ned Phillips
Founder and Chief Executive Officer
Bambu

Nagaraj Prasadh
Director & Country Head
Intellect Design Arena

Trawut Luangsomboon
Chief Executive Officer
Jitta

11.05am	Refreshment & Networking
11.30am	Presentation The Indian growth story

Praveen Jagwani
Chief Executive Officer
UTI International

- Drivers of Indian growth
- The reform agenda
- Currency outlook
- Equity opportunity

11.40am	Presentation Residence and citizenship planning for Asian families - an overview

Scott Moore, IMCM
Managing Director
Henley & Partners

- Why do families relocate?
- What should HNW families consider when carrying out residence and citizenship

planning?
- Current developments in residence and citizenship programmes

11.50am

Presentation
Small-caps shine bright

Sumetha Lewchalermwong
Country Head, Thailand
Franklin Templenton Investments

- Small-cap stocks have the potential to offer what is becoming ever-more rare in a slowing global economy – growth
- Uncovering interesting growth opportunities in a space that is highly under-researched and overlooked by many managers and investors
- How do you overcome risks associated with small-cap investing?
- How do we identify undervalued stocks in the Asian small-cap space that could rise to become tomorrow's stars?

12.00pm

Panel Discussion

Evolving distribution in Thailand

- Where and how do people most buy wealth management products in Thailand? How is the product distribution process changing - or likely to change in the next few years?
- Many banks talk about open architecture, but is this really happening?
- How can banks differentiate their offerings in terms of product and advisory capability - not just provide gimmicks or perks to attract new clients?
- How can they encourage clients to diversify their portfolios by shifting away from deposits and simpler products?
- Where are the product gaps? And how will the investment universe develop?
- As the ability to invest offshore becomes easier, what format will be used? What are the practical challenges?
- How can product manufacturers as well as the banks and other wealth management firms engage the younger generation more effectively?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Don Charnsupharindr
Retail Banking Head
Citi

Nont Buranasiri
Co-Founder
Ally Global

Paul Gambles
Director
MBMG Group

Sukit Jarutchaiwanna
Head of Managed Investment and Advisory

	Standard Chartered Bank
12.45pm	Lunch & Networking
1.35pm	Panel Discussion

Evolving distribution in Thailand

- Where are the biggest opportunities - and challenges - for insurance companies in the Thai wealth management space?
- What does open architecture really mean in Thailand?
- What's the opportunity for the further development of the unit-linked business?
- Insurance companies vs banks - collaboration or competition?
- Are insurance companies engaging customers as effectively as they could, especially the younger generation? And marketing to them in a way that resonates with them?
- What is the right digital strategy?
- How to enhance credibility and perception of agents in the eyes of consumers?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

David Varley
Head of High Net Worth - Asia
AXA

Samdarshi Sumit
Chief Retail Officer, Retail Business
Generali

Kris Chantanotoke
Senior Executive Vice President
Thai Life Insurance

2.00pm Presentation
Liquid alternatives in wealth management

Steve Knabl
Chief Operating Officer & Managing Partner
Swiss-Asia Financial Services

- Wealth managers and investors alike are getting more sophisticated
- They require more sophisticated offerings – to ensure that their clients get the best there is in the market when it comes down to investment ideas
- Emotions also play a large role in investing today - something different to the norm, and different to your friends/peers
- Wealth managers can now use securitised investment solutions to structure interesting investment ideas and allocate to their client portfolios seamlessly
- These solutions were once only available to a select few, but today they are becoming plain vanilla

2.10pm Presentation
Challenges in advising business families

Shanker Iyer

Independent Financial Advisor

- Common challenges faced by business families
- The demands placed on advisers to meet these

2.20pm

Presentation
WHAT IF an Uber Wealth was born?

Nagaraj Prasadh
Director & Country Head
Intellect Design Arena

- Why everyone is talking about digital wealth management
- How companies are leveraging digital wealth
- The adoption path for digital wealth
- How to measure success of digital wealth initiatives

2.30pm

Panel Discussion

What’s next for asset management?

- What does the future hold for bank-owned asset management companies in Thailand?
- How should they develop their product and service offering to stand out?
- How can local firms collaborate with offshore providers to expand the overall offering?
- What’s the role for foreign asset management companies in Thailand? How do they perceive the opportunities and how can they be successful here?
- Niche vs full service - what’s the right strategy?
- How can the regulators facilitate a more mature asset management industry for local and foreign players alike?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Theeranat Rujimethapass
President
Tisco Asset Management

Evan Gallagher
CEO & Managing Director
ASK Capital Management

Win Udomrachtavanich
Chief Executive Officer
One Asset Management

Kittikun Tanaratpattanakit
Senior Research Analyst
Morningstar

3.15pm	Refreshment & Networking

3.45pm Panel Discussion

What can we learn from the world of wealth management globally?

- How do international banks create true open architecture platforms?
- What are the issues and challenges, and how do they overcome these?
- How do the most successful foreign players build a holistic wealth management service?
- What does it take to create a differentiated and consistent product and advisory capability?
- What do international banks do to ensure their technology is cutting edge?
- How do foreign asset management firms create winning relationships with distributors in more mature markets?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Michael Benz
Former Group Head of Private Banking
Standard Chartered Private Bank

Ranjit Khanna
Singapore Branch Chief Executive, Market Head, South Asia, Private Banking
UBP

Praveen Jagwani
Chief Executive Officer
UTI International

Steve Knabl
Chief Operating Officer & Managing Partner
Swiss-Asia Financial Services

Shanker Iyer

Independent Financial Advisor

Michael Gagie
Managing Partner, Singapore and Global Head

4.30pm Panel Discussion

What's the best investment advice you can give clients today?

- How can clients really build a more diversified portfolio?
- Where are the opportunities for our clients?
- How can we educate clients to have a long term mind-set?
- How can we make the engagement with investment solutions more 'sticky'?
- What are the best ways to get more people invested in mutual funds?
- Private funds vs mutual funds - creating more choice and outcomes for clients
- Risk management is key - but how can we get it right?
- How can we encourage customers to increase their risk tolerance?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Charnwut Roongsangmanoon
Executive Vice President, Head of Global-Fixed Income & FX Department
MFC Asset Management

Ted Low

Low Risk Capital

Mandeep Nalwa
Chief Executive Officer, Asia & Middle East
Taurus Wealth Advisors

Thomas Friedberger
Managing Director, Head of Equity & Diversified Strategies
Tikehau Capital

5.15pm	Forum Ends