Thailand Wealth Management Forum 2017

8.40am	Registration
9.00am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
9.05am	Panel Discussion

Building capacity and capability in Thai wealth management

- What's driving growth in the Thai wealth management market?
- What do we need to do to move faster?
- What are the needs of your clients? How can you help them?
- Onshore / offshore
- Do it yourself or partner with someone else?
- How can we develop the advisory proposition and make money out of it?
- Can we change the mind-set and educate bankers to actually think about putting the client's needs first?
- What's the training and competency framework that's relevant and most effective?
- The role of digital – does it really matter?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Triphon Phumiwasana
First Senior Vice President, Head of Private Banking Business
Kasikornbank

Vincent Duhamel
Head of Asia Pacific and Japan
Lombard Odier

Don Charnsupharindr
Retail Banking Head, Thailand
Citi

Narit Kosalathip
Assistant Managing Director, Private Wealth Management
Phatra Securities

Patrick Busse
Director, Head of EAM South East Asia & International
Credit Suisse

Cholathee Pornrojnangkool
Senior Vice President, Priority Clients Segment & Retail Banking
Standard Chartered Bank

Nagaraj Prasadh
Country Head, Thailand
Intellect Design Arena

Wen Yen Choo
Sales, South-east Asia
Citi Private Client Solutions

Speaker

9.55am Keynote Presentation

Evolution of private banking and wealth management resulting from digitisation

Grzegorz Prosowicz
Head of Consulting and Product Management
Comarch Capital Markets

Anna Sacha
Senior Consultant
Comarch

- New reality and challenges in private banking and wealth management
- Exploring reasons and aims of digitisation.
- How technology can complement the traditional approach to private banking.
- Recommendations for digital strategies

10.15am WealthTalk

Building a future-proof wealth management offering

- The relevance of private banking today in Asia
- The wave of consolidation: will we see more?
- The challenges in building a successful and relevant offering
- How to get your positioning right

Evrard Bordier
CEO and Managing Partner
Bordier & Cie

10.45am Presentation
Growth through partnership – the unique Credit Suisse wealth management set-up in Thailand

Sascha Zehnter
Managing Director, Head of External Asset Managers, South-east Asia Private Banking Division, and Head External Asset Managers, Asia Pacific Platform
Credit Suisse Wealth Management

- Opportunities for the External Asset Managers business
- Developments in Asia

10.55am Refreshment & Networking

11.25am Presentation

How to deliver a sustainable digital offering

Peter Scott
General Manager Asia Pacific & Member of Executive Board - Avaloq
Avaloq

- In a maturing market like Thailand, with rising incomes, there is growing demand for more sophisticated investment products and services
- How can banks embrace digital delivery to reduce operating costs in a sustainable way?

11.35am Presentation
Enhancing customer experience right from onboarding a client

Yvonne Mok
Director of Sales, Asia Pacific
Appway

- How to ensure effective account opening in the private banking and wealth management space?
- Any possibility to automate compliance/regulatory/KYC checks and risk calculation?
- How to stay ahead of your peers?

11.45am 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: learning, customer delight, performance tracking, speed and ease for acquisition

11.55am Presentation
Buying vs building fintech solutions

Frank Maltais
Director, Sales & Business Development, Global Exchange, Software Solutions, Asia Pacific
State Street

- The state of the industry
- Pros and cons between the two approaches
- A decision tree to help make the right choice

12.05pm Presentation
Investor migration and the rise of the global citizen

Dominic Volek
Group Head of Private Clients
Henley & Partners

- Global trends and developments in investor migration
- What's driving investor migration for Asian HNWIs?
- Key considerations for HNWIs in relation to residence and citizenship planning

12.15pm

Presentation
Tax incentives for Singapore-based fund managers

Shanker Iyer

Independent Financial Advisor

- Resident fund scheme
- Enhanced tier fund scheme
- Offshore fund scheme

12.25pm

Panel Discussion

Wealthy business families in Thailand – how do we meet their needs?

- How does CRS and information exchange create challenges or opportunities for you?
- Inheritance tax – and other types of tax – are these driving clients to get advice for the first time?
- What is the current level of knowledge and activity around preserving and protecting wealth?
- How do clients currently think about succession planning? What solutions do they use?
- How can we drive more effective and specific conversations about insurance and other products or structures for inter-generational wealth transfer?
- Who are the right professionals and advisers for families to engage? And how should they choose between them?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Triphon Phumiwasana
First Senior Vice President, Head of Private Banking Business
Kasikornbank

Simon Lints
Chief Executive Officer - Singapore
Cazenove Capital

Evrard Bordier
Managing Partner
Bordier & Cie

Philipp Piaz
Partner
Finaport

Shanker Iyer
Chairman
The Iyer Practice

Steven Seow
Head of Wealth Management, Asia
Mercer

Speaker

1.05pm Lunch & Networking

1.50pm Panel Discussion

Insurance – finding relevant solutions for Thai clients

- What are the priorities for insurance companies to develop their offerings to capture more of the growth in wealth?
- How do we drive the right types of needs-based conversations with our clients?
- What's the role of insurance in proper wealth planning?
- How do we diversify the types of insurance products and solutions we sell to our clients?
- What's most suitable to clients – such as variable products, unit-linked policies and term?
- Where is new business going to come from over the next 5 to 10 years?
- What are the right tools and ways to engage clients today – and also the next generation?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Michael Parker
Vice President & General Manager, Thailand, and President & Chief Executive Officer, Manulife Insurance, Thailand
Manulife

Samdarshi Sumit
Chief Retail Officer, Retail Business
Generali Life Assurance

Wen Yen Choo
Sales, South-east Asia
Citi Private Client Solutions

Philipp Piaz
Partner
Finaport

Speaker

2.25pm Head - to - Head Q & A

Building a world-class wealth management business in Thailand

Vira-anong C. Phutrakul
Managing Director, Head of Retail and Brand
UOB Bank

- What are the strategic priorities for Citibank in Thailand?
- How are you improving the wealth management offering and related products / services?
- What enhancements to the platform are in the pipeline?
- How important is digital to you? And what are your key digital initiatives?

2.35pm

Presentation
The technology wake-up call for the buy-side: top 3 priorities for optimal performance

Erdem Ozgul
Managing Director
Numerix

- Increasing market complexity and other challenges are putting pressure on the buy-side to streamline their operations, enhance efficiency and improve functionality – from the front to the back office
- As a result, the technology needs of today stretch across software, hardware and infrastructure

2.45pm

Presentation
Singapore & Hong Kong as Asian wealth management centres & overview of CRS and AEOI

Irene Lee
Head of Business Development, Singapore
Equiom Group

- Overview – Asia in general
- Singapore and Hong Kong as wealth management centres
- Singapore & Hong Kong companies
- Brief summary on CRS & AEOI
- Other estate planning tools

2.55pm

Presentation
Lifting the lid on beneficial ownership

Eve Tay
Director, Client Solutions
Asiaciti Trust

- As part of a global push on transparency led by the G20 countries, International Financial Centers worldwide are beginning to establish a central register to hold beneficial ownership
- How are the various jurisdictions coping with the pressure and the recent changes in their law to push for revealing of beneficial owners details?
- How will these changes affect individuals who are looking to set up an asset-holding company?
- What other important factors does one need to consider when setting up a company? Succession planning and asset protection as key themes that are being considered

3.05pm

WealthTalk

Taking Asia's independent community to the next level

- What's the opportunity for independent/external asset management firms in Asia?
- How to drive growth and greater industry collaboration
- Fostering best practices

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

3.15pm Refreshment & Networking

3.40pm Panel Discussion

The chicken and the egg: the asset management dilemma?

- To what extent will platforms like FundConnext facilitate mutual fund distribution in a meaningful way?
- Given that we have mis-managed investor expectations in the past – is it likely that we can deepen fund penetration?
- Instead of fishing in the same pond – how can we create new demand and interest for funds?
- How might schemes such as a Mandatory Provident Fund help the situation?
- Do we need to expand the product range? Especially given the simple demands of clients.
- How do we move from 'pushing' product to taking a long-term solutions-type approach?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Benjarong Techamuanvivit
First Senior Vice President, Strategic Planning Division
Kasikorn Asset Management

Pote Harinasuta
Chief Executive Officer
One Asset Management

Kittikun Tanaratpattanakit
Senior Research Analyst
Morningstar

Paul Gambles
Managing Partner
MBMG Group

Steve Knabl
Chief Operating Officer & Managing Partner, Swiss Asia
President, Association of Independent Asset Managers (Singapore)

Leon Mirochnik
Head of Business Development
Enhanced Investment Products

Speaker

4.20pm WealthTalk

My job is to make money for my clients – all I need are some magic bullets

- How much of our time and effort do we focus on chasing returns for clients – and how much (little) on risk management?
- How successful are we at making clients good returns?
- How much of that was down to us and how much was just the market?
- How do clients feel when they make money?
- How do they feel when faced with unexpected losses?
- Will opening up to more global assets, funds and strategies make the job easier or harder going forward?

Paul Gambles
Director
MBMG Group

4.30pm Head - to - Head Q & A

Finding the right technology partner

Shyh Jih Lee
Business Solutions Manager, Asia
ERI

- With an emerging private wealth management (PWM) market like Thailand, how can a technology solution provider help?
- What should emerging market PWM be doing to take advantage of real innovation/automation, to benefit both its clients and its own profitability?
- What can digitisation mean for emerging market PWM?

4.40pm Presentation
India - a bright spot in the global economy

Sameer Dev
Managing Director
ASK Capital Management

- The Indian opportunity is and will continue to be an exciting opportunity that cannot be ignored
- It's presence on the global stage will continue to grow and make ongoing impact thanks to the macro story and regulatory advances thanks to the Modi Government
- The market statistics show it is a market that continues to perform above and beyond expectations more so when compared with other emerging markets and developed markets

4.50pm Panel Discussion

How will you navigate the investment markets in 2017?

- Where do you see the biggest investment opportunities and challenges?
- How do clients think today?
- And how do you manage their expectations?
- How will geo-political risks impact the landscape?
- To what extent do Thai clients really want to diversify their portfolios?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Ved Vyas
Senior Portfolio Manager
Secure Wealth Management

Jeremy Ng
Chief Executive Officer, Singapore, and Head of Sales, Asia
Leonteq Securities

Sameer Dev
Managing Director
ASK Capital Management

Pipat Luengnaruemitchai
Assistant Managing Director, Co-Head of PWM Research, Private Wealth Management
Phatra Wealth Management

Speaker

5.20pm	Forum Ends