Vietnam Wealth Management Forum 2016

8.40am Registration

9.00am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.05am Panel Discussion

What is the potential that wealth management in Vietnam represents?

- How can we prepare for the potential that exists for wealth management in Vietnam – even though the market is not ready yet?
- How long will it take to develop?
- What is needed to take the market to the next level?
- How will the wealth evolve and grow?
- How will you segment your clients?
- How do you expect the product proposition to develop?
- In which areas is education most needed? And whose responsibility is it?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Sandeep Deobhakta
Vice President, Regional Bancassurance Officer
VP Bank

Thai Nguyen Thuan
Managing Director
VinaCapital

Duc Cuong Trinh
Head of Retail Banking
MB Bank

Tim Searle
Founder and Chairman
Globaleye

Duc Hung Duong
Head of Retail Banking
ANZ

9.50am Presentation
Residence and citizenship planning for Asian families - an overview

Sylvie Ma
Managing Partner

Henley & Partners

- Why do families relocate?
- What should HNW families consider when carrying out residence and citizenship planning?
- Current developments in residence and citizenship programmesEast

10.00am

Presentation
Insurance products as a key solution in managing wealth

K R Raju
Partner
MCG Group

- Developing opportunities for insurance companies
- Business insurance

10.10am

Panel Discussion

How can we accelerate the development of Vietnam's capital markets – and create the infrastructure for wealth management?

- How can we deepen liquidity in Vietnam's capital markets?
- What should the regulators do to help spur further development?
- How can we create more diversity?
- What direction should growth take in the securities market?
- How can we create the right framework for mutual funds and other wealth management products?
- What's the potential to develop more private equity opportunities?
- What players and expertise within asset management and other segments do we need to create a wider variety of products to help the market develop and spur diversification?
- What's the outlook for the financial markets in Vietnam over the next decade?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Thi Kim Cuong Tran
CEO & Chief Investment Officer
Manulife Asset Management

Kevin Snowball
Chief Executive Officer & Chief Investment Officer
PXP Vietnam Asset Management

Andreas Vogelsanger
Chief Executive Officer
AFC Vietnam Fund

Cong Thien Le
Deputy Chief Executive Officer

Ho Chi Minh Securities

Hanh Luong Thi My
Head of Domestic Asset Mangement
Dragon Capital

Sancho Chan
Chief Investment Officer, Head of ALM
Sun Life Financial

Avinash Satwalekar
Chief Executive Officer and Chief Investment Officer
Vietcombank

11.00am Refreshment & Networking

11.30am Panel Discussion

Developing opportunities for insurance companies in Vietnam

- Where are the biggest opportunities and challenges for insurance companies in Vietnam?
- How will products develop and diversify?
- Married or dating – what's the best approach for banks and insurance companies?
- How should the regulators help facilitate the industry's further development? What would this mean for the insurance industry?
- How can we reach the customer? What can insurers do to better educate potential customers about their insurance-related needs?
- What's the role of technology – including the digital opportunity?
- How can we improve the client experience?
- How to enhance credibility and perception of agents in the eyes of consumers?
- Can the industry increase the number of productive agents - especially with younger talent?
- What tools will increase productivity?
- What developments in other markets can Vietnam adopt?

Chair

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Founder & Chief Executive Officer
Hubbis

Speaker

K R Raju
Partner
MCG Group

Bao Nguyen
Chief Distribution Officer BIDV Metlife
BIDV MetLife

Victor Lye
Group Head of IFA & Benefits
FWD

Michael Gerber
Managing Partner & Chief Executive Officer
Synpulse

12.15pm Presentation

Building an effective and efficient product offering

Erdem Ozgul
Managing Director
Numerix

Trends and best practices in creating, distributing and managing risk of investment products
Utilising innovative technologies to overcome challenges with legacy systems and processes, and improve productivity and profitability

12.25pm Presentation
European citizenship through investment

Barry Winter
Regional Sales Manager
Pafilia

- Cyprus
- The Citizenship Program
- Property investment

12.35pm Panel Discussion

How technology can transform your business

- What is the role of technology within financial services and wealth management?
- What are the key digital trends and how are they changing the business?
- How are emerging technologies reshaping the way banks connect with customers?
- How can you leverage technology across multiple channels to drive customer acquisition, and retention?
- How can and should you look to use data to drive actionable insights?
- How can digital be leveraged further?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Erdem Ozgul
Managing Director
Numerix

Eddie Thai
Venture Partner
500 Startups

Amit Malhotra
Head of Retail Banking, Vietnam
Standard Chartered Bank

1.10pm Lunch & Networking

2.00pm Panel Discussion

What can we learn from wealth management markets elsewhere in Asia?

- Trends and best practices in wealth management across Asia
- What is the stage of development of the industry in the more developed hubs of Hong Kong, Singapore and Australia?
- How is wealth management evolving in developing markets like Thailand, the Philippines, India, etc?
- What lessons can we learn from the journeys in these markets so far?
- What are some of the steps that regulators across Asia have taken to facilitate industry growth?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Sumeet Bhambri
Global Head - Advisory & Managed Investments
Standard Chartered Bank

Stephan Repkow
Founder & Chief Executive Officer
Wealth Management Alliance

Dominic Volek
Group Head of Private Clients and Member of the Executive Committee
Henley & Partners

Barry Mitchell
Group Legal Counsel
AMS Trustees

Eric Solberg
Chief Executive Officer
EXS Capital

2.45pm Panel Discussion

Why should wealth management be important to you?

- What are the key components of wealth management?
- How can you determine the opportunity for you?
- What's the starting point to growing and evolving in wealth management?
- What is the fundamental role of a relationship manager or client adviser in wealth management?
- What products should you be offering to clients? And how do you build the right product platform?
- How can you make money via wealth management?
- How can you manage and incentivise staff?
- Are there any 'easy wins' in building a wealth management business?
- What has proven successful on other markets?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

James Murphy
Lecturer and Course Leader in Finance
RMIT International University

Khanh V. Nguyen
Founder & Chief Executive Officer
Rameses Consulting

Afonso Vieira
Managing Director and Head of Investment Management
Total Wealth Management

David MacDonald
Head of Learning Solutions
Hubbis

3.30pm	Refreshment & Networking

3.55pm

Presentation
Understanding – and selling – mutual funds

Thi Kim Cuong Tran
CEO & Chief Investment Officer
Manulife Asset Management

- What are mutual funds?
- Why should your clients buy them?
- How do you sell them?
- What's the outlook for mutual funds in Vietnam?

4.10pm

Presentation
Building an insurance offering

Fabien Jeudy
Chief Executive Officer
Sun Life Financial

- What are the different kinds of insurance products that exist?
- What are the drivers for clients to buy different types of insurance?
- Where do insurance products fit into a client's wealth management strategy?
- How do you have the right types of conversations with clients about insurance?

4.25pm

Presentation
Private managed accounts for HNWIs in Vietnam

Hang Le Thi Le
Chief Executive Officer
SSI Asset Management

- Potential of professional asset management for HNWIs in Vietnam
- What can we do to promote this market segment?
- Private managed accounts for HNWIs at SSIAM

4.35pm

Presentation
How to have needs-based conversations with clients

David MacDonald
Head of Learning Solutions
Hubbis

- What does a world-class relationship manager do?
- What skill-set, knowledge base and mind-set do bankers and advisers need to be successful in wealth management?
- What's your role in educating customers?
- How can you have a proper needs-based conversation with a client? What's the process?
- Training your client - how can you have suitable product-related discussion with your clients?
- What's the broader relationship you should strive for with your clients?
- What behaviours build trust with customers?

5.00pm

Forum Ends