

# Vietnam Wealth Management Forum 2017

8.40am Registration

9.00am Welcome Address

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

9.05am Panel Discussion

How do we lay the foundations for wealth management in Vietnam?

- What is the potential for the development of the financial services landscape in Vietnam?
- Is there a meaningful role for wealth management?
- Local banks are not seriously looking at wealth management at the moment. Why is that? Will it change?
- What are the catalysts to kick-start the domestic market?
- What do customers really know about any of the products available? How can we better educate them?
- What do market developments such as the launch of derivatives mean for wealth management?
- How should we prepare for the potential that exists for wealth management in Vietnam – even though the market is not ready yet?
- Universal banks Vs local banks – who is best-placed to benefit from market growth when it happens?
- Where will wealth come from in Vietnam in the next 10 years – and how can we get prepared for it?

Chair

Michael Stanhope  
Chief Executive Officer & Founder  
Hubbis

Panel members

Lan Anh Do  
Head of Wealth Management, Vietnam  
Standard Chartered Bank

Fred Lim  
Executive Director, Retail Banking  
UOB Ho Chi Minh City Branch

Johan Nyvene  
Chief Executive Officer  
Ho Chi Minh City Securities Corporation

Bao Nguyen  
Chief Executive Officer  
Vietnam Capital Advisors

Kenneth Atkinson  
Chairman, Grant Thornton Vietnam

Chairman, British Business Group Vietnam

Sylvie Ma  
Managing Partner, Vietnam  
Henley & Partners

Speaker

9.55am

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

10.25am

Presentation  
Residence and citizenship planning

Sylvie Ma  
Managing Partner  
Henley & Partners

- Why people need residence & alternative citizenship

10.40am

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's ties with Vietnam
- Singapore and Hong Kong as wealth management centres
- Singapore & Hong Kong companies
- Brief summary on CRS & AEOI
- Other estate planning tools

10.55am

Refreshment & Networking

11.25am

Presentation  
Breaking down silos in financial services

Benjamin Turner  
Solutions Consultant and Product Management APAC  
Liferay

- Silos exist in any organisation – and those organisational silos have historically given rise to technology silos; think the marketing department owning the website while the IT department owns internet banking, with each typically being implemented using different technologies
- Some of the challenges with siloed technology are inconsistent user experiences, inability to provide information that is contextually relevant, and so on
- In this session we'll demonstrate how customers have used Liferay Digital Experience Platform to enable cooperation between organisational silos and to implement solutions that break down technology silos

11.40am

WealthTalk

Portugal – the new IFC?

- How Vietnamese families are now using Portugal as an IFC
- What are the rules and how do they work in practice?

Afonso Vieira

Managing Director and Head of Investments  
Total Wealth Management

11.55am

WealthTalk

What does it take to be successful in wealth management today?

- Market challenges
- Industry trends
- What clients want from you
- How to be a successful wealth manager in today's environment

Michael Stanhope

Founder & Chief Executive Officer  
Hubbis

12.25pm

Lunch & Networking

1.15pm

Panel Discussion

Asset management in Vietnam – driving the development of funds and an investment mind-set

- What are the opportunities and challenges for Vietnam's asset management industry?
- How can we create the right framework for mutual funds in Vietnam?
- What players and expertise do we need to create a wider variety of products to help the market develop and create diversification?
- The mind-set of Vietnamese is still very short-term oriented – yet it's impossible to get short-term gains from funds. How do we change the investor mind-set to look longer term?
- What else can we do to better educate customers?
- Where are the opportunities for both local and international investors?

Chair

Michael Stanhope

Chief Executive Officer & Founder  
Hubbis

Panel members

Hoai Thu Nguyen  
Managing Director  
VinaCapital

Le Le Hang  
Chief Executive Officer  
SSI Asset Management

Kevin Snowball  
Chief Executive Officer  
PXP Vietnam Asset Management

Andreas Vogelsanger  
Chief Executive Officer  
AFC Vietnam Fund

Speaker

2.05pm

WealthTalk

Creating the framework for funds distribution

- Why do universal banks sell mutual funds?
- What is the infrastructure and expertise required?
- How do you build it?
- How important are funds for the overall wealth management business of banks?

Andrew Hendry  
Managing Director, Asia  
Westoun Advisors

2.15pm

WealthTalk

Driving diversity via mutual funds

- What is the role of mutual funds in investor portfolios?
- How do they create diversification?
- What's the outlook for mutual funds in Vietnam?

Thai Nguyen Thuan  
Managing Director  
VinaCapital

2.25pm

WealthTalk

Deepening the Vietnam market through IPOs

- How to increase liquidity and diversity in Vietnam
- Accessing IPOs

Bill Stoops  
Chief Investment Officer  
Dragon Capital

2.35pm

Refreshment & Networking

3.05pm

Head - to - Head Q & A

Developing the insurance offering in Vietnam

Paul George Nguyen  
Vice President, Chief Executive Officer, Vietnam  
Manulife

- Where are the biggest opportunities for insurance companies in Vietnam??
- How will the product offering develop and diversify?
- How can we improve the client experience?
- How can you make money via wealth management?

3.15pm

Head - to - Head Q & A

Accessing the multi-family office opportunity

Stephan Repkow  
Founder & Chief Executive Officer  
Wealth Management Alliance

- What is a multi-family office?
- Why did you set up your firm?
- How has that model evolved in Asia?
- What is the potential opportunity for firms to collaborate with you?

3.25pm

Panel Discussion

How can banks prepare for the wealth management evolution in Vietnam?

- When will wealth management become more important to the development of Vietnam's financial landscape?
- Insurance is easier for banks to sell, and they make good money from it. So why should banks start to sell funds and other financial products?
- Will there be a B2C distribution model in Vietnam that differs from other Asian countries?
- What do market developments such as the launch of derivatives mean for wealth management?
- Is there scope for any other wealth management products?
- How many years is Vietnam behind other countries in terms of clients' financial literacy and product development?
- What should the regulators do to help spur further development?
- What's the outlook for the financial markets in Vietnam over the next decade?

Chair

Michael Stanhope  
Chief Executive Officer & Founder  
Hubbis

Panel members

Dung Dang Tuyet  
Deputy Chief Executive Officer, and Chief Executive Officer of Retail Banking  
Maritime Bank

Michael Gerber  
Chief Executive Officer  
360F

Andrew Hendry  
Managing Director, Asia  
Westoun Advisors

Piotr Zboinski  
Head of Operations & Strategy, Management Consulting  
Orbium

Speaker

4.15pm

WealthTalk

A customer led approach to wealth management

- How do we achieve this?

Sandeep Deobhakta  
Vice President, Regional Bancassurance Officer  
VP Bank

4.30pm

Forum Ends