THAILAND WEALTH MANAGEMENT FORUM 2023

8.30am	Registration
8.55am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
9.00am	Panel Discussion What themes will shape the industry in the next ten years? • How is the asset & private wealth management industry evolving? • What are the challenges? • How are client expectations evolving? • What growth potential lies ahead, and where are the key opportunities for the foreseeable future? What are your key priorities over the next 12-months? • How can you differentiate your offering? How can you redefine your proposition? Have you done anything innovative? • Are local HNW clients still predominantly happy to use Singapore as their financial centre rather than onshore firms for their wealth management needs? • Fees, profitability, cost – what’s the right business model? Chair Manoj Prajapati Head of Sales, South Asia Allfunds Speaker Triphon Phumiwasana Managing Director, Private Banking Business Head Kasikornbank Win Udomrachtavanich Executive Chairman DAOL Asset Management Pote Harinasuta Director & Chief Executive Officer One Asset Management Dr. Silvio Struebi Partner Simon-Kucher Global Strategy Consultancy
9.30am	Presentation Wealth as a Service: Looking beyond the “Crazy Rich Asians” Yash Shah Partner Synpulse

Global wealth managers are heavily investing with a laser focus on capturing the growing HNWI population in Asia's emerging markets. The local universal banks are revamping their client segments to provide tailored advisory services to the wealthy. But are the resources being allocated towards the correct target client base? Are we missing the accelerated growth of a particular wealth segment which will overshadow the HNWI wealth base in the near future? Let's look beyond Asia's crazy rich and understand how WMs are gearing up with innovative wealth operating models to capture, service and retain this underserved population.

9.45am

Panel Discussion

Evolving the Platform and Proposition

- How have you been evolving your platform, processes, and products?
- What are the changing expectations of clients?
- How does this help you in the curation and delivery of advice?
- Have you made any real progress in your digital journey?
- How does digital improve your traditional value proposition?
- What are the products and services you could offer? How can your proposition evolve?
- What is you view on separate platforms that offer wealth management - external to a bank?
- What do you think about digital assets?

Chair

Yash Shah
Partner
Synpulse

Speaker

Win Phromphaet
EVP - Head of High Net-Worth Division
Bank of Ayudhya

Philipp Piaz
Partner
Finaport

Thiyachai Chong
Head, Wealth Management & Preferred, Executive Vice President
CIMB Bank

10.15am

Presentation
Citizenship and Residency – Opportunities and Trends for the year ahead

Rory McDaid
Managing Director Private Clients
Henley & Partners

- Alternative residences or citizenships in times of Political Uncertainty
- Domicile diversification – a new asset class
- Real estate investment rankings for migration

10.30am

Presentation
Isolating Alpha in Uncertain Times

Rahul Mathur
Investment Manager
GAM Investments

- Central Banks' dilemma – preserving financial stability versus taming inflation
- European Fixed Income – limits to ECB tightening
- Emerging markets – policymakers ahead of the curve or dispersion of outcomes
- Currency trends – are FX markets driven by Interest Rates or growth differentials?

10.45am

Presentation
China reopening and framing for 2023 opportunities in China and ASEAN

Laura Lui
Partner, Co-Chief Investment Officer
Premia Partners

- Where are we in China's reopening trajectory, from business fundamentals to evolution of investor flows and allocations?
- Tactical and strategic bets – why are policy supported sector leaders well placed to outperform?
- Investment case and tailwinds supporting emerging ASEAN as the natural beneficiaries of China recovery and source of uncorrelated returns.

11.00am

Refreshment & Networking

11.30am

Presentation
Strengthening customer lifetime value in wealth management

Anna Sacha
Senior Consultant
Comarch

- Importance of customer lifecycle and the main milestones
- Elements of customer lifetime value
- Tools and ideas to strengthen customer lifetime value

11.45am

Head - to - Head Q & A

Parida Leelaniramol
Sales Director
Comarch

- How are wealth managers in Thailand enhancing their digital capabilities?
- What are some of the trends we are likely to see?
- How does Comarch help with the process of digital transformation?

12.00pm

Presentation
Lumen Vietnam – Investment Pearl in Southeast Asia

Cong Minh Luong
Head of Research
Vietnam Holding Asset Management

- China Plus One Strategy: Vietnam
- Macro Insights
- Why Vietnam? Vietnam is an excellent diversification for your portfolio

12.15pm

Presentation - MFEX by Euroclear
Re-inventing access to private markets

David Genn
CEO
Euroclear

- Why are private markets an increasingly critical part of private wealth clients' portfolios?
- How do private wealth managers access private markets at the moment and what are the pros and cons?
- What trends are emerging for new operating models to improve access to this asset class?
- What does the future hold for investing in private markets?

12.30pm

Panel Discussion

Curating winning client portfolios

- What are the opportunities and challenges for the year ahead?
- How are you managing risk in 2023? Is it time to take on more risk?
- What's your favourite asset class now?
- How are you generating income for clients?
- What's your view on alternative investments? Digital assets? Private Markets?
- How do you choose the right investment partners?
- How can you consistently deliver performance and differentiate your offering?

Chair

Rossen Djounov
Global Head of Distribution and Client Solutions
GAM Investments

Speaker

Dr. Jon Wongswan
Managing Director
Kiatnakin Phatra Securities

Paul Gambles
Director
MBMG Group

Harmen Overdijk
Chief Investment Officer
Leo Wealth

Yifei Li
Managing Director, Institutional Sales
Alta

1.00pm Panel Discussion

What are the issues Effecting HNW and UHNW Clients in Thailand?

- How does inheritance tax apply to foreign trust structures? And what are the reporting requirements under CRS?
- What are the current Trends and Concerns for International Families?
- How can you protect assets and wealth for the next generation?
- Which centres are likely to be most attractive in the future?
- What are the trends around citizenship and migration?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Jonathan Stuart-Smith
Tax Partner
Mazars

Woon Hum Tan
Partner, Head of Trust, Asset & Wealth Management Practice
Shook Lin & Bok

Zac Lucas
Partner – International Private Wealth
Spencer West LLP

1.30pm Lunch & Networking

2.00pm Agenda