

# Vietnam Wealth Management Forum 2018

8.40am Registration

9.00am Welcome Address

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

9.05am Panel Discussion

How is the wealth management offering in Vietnam developing?

- When will we see a 'real' wealth management offering?
- What's the role of the regulators?
- How do the different players – asset management, securities firms, insurance and banks compete or complement each other?
- What's the opportunity for international private banks potentially in the future?
- What's the role and growth of the commercial banks in personal / retail banking?
- How important is digital today?
- What changes are we seeing in client expectations and behaviour?
- Where will the continued growth come from and what are your priorities?
- How can we offer a more complete service for our clients?
- What's happening in the insurance market?
- How can we make the most of the opportunity to provide wealth management products to the affluent segment?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

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

Johan Nyvene  
Member of the Board of Director  
Ho Chi Minh Securities

Minh Nguyen  
Country Manager  
Aetna

Kimmis Pun  
Managing Director, Head of Private Banking, Singapore  
VP Bank

9.55am Head - to - Head Q & A

What are the trends among Vietnamese when considering investment overseas and

migration?

Sylvie Ma  
Managing Partner  
Henley & Partners

- Who is Henley & Partners?
- What are the considerations for HNWIs in relation to residence and citizenship planning?
- What are the benefits for the wealth management community?

10.05am

Presentation  
Private Banking into the Future: What's the latest trend of private banking in Asia?

Kimmis Pun  
Managing Director, Head of Private Banking, Singapore  
VP Bank

- What are the some of the trends we are seeing today in Asian Private Banking?
- How are the needs of wealthy clients in Asia changing?
- What are the challenges that the industry faces today?
- How will the investment offerings change in the next few years?

10.25am

Panel Discussion

TECH / DIGITAL / PLATFORMS

- Does technology mean - Faster, cheaper and better wealth management
- Why is the technology platform important? How do you choose the right one?
- How does technology help with KYC and onboarding clients?
- Will bank branches disappear – will wealth management in Vietnam be digital?
- What digital trends are we seeing elsewhere?
- What can you distribute down a digital channel?
- How does wealth management operate?
- How can we build a more robust offering?
- What's the right thing to do? How can you understand the market?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Michael Gerber  
Chief Executive Officer  
360F

Bao Nguyen  
Country Director Vietnam  
GoBear

Kelvin Lim  
Head of Business Development, Asia  
IRESS

Namit Khanna

Sales Director - SEA & India  
InvestCloud

11.00am

Presentation  
Current Wealth Management Trends

Irene Lee  
Business Development Director, Intermediary and Partnership  
Hawksford

- Overview - Asia in General; GDP and Growth
- Updates on Singapore and Hong Kong as Wealth Management Centres
- Brief Updates on CRS and AEOI
- Tax Compliant Estate Planning Tools

11.10am

Refreshment & Networking

11.35am

Presentation  
What are Structured Products?

Xavier Burkhardt  
Executive Director  
Leonteq

- How do they provide protection, extra returns, or optimised your asset allocation?
- Are they always based on an underlying asset - equity, a bond, an index, foreign currencies, or commodities?
- Why do wealthy clients buy them?

11.50am

Presentation  
Relationships and how to build them

David MacDonald  
Head of Learning Solutions  
Hubbis

- Augment your reality
- The human advantage

12.05pm

Panel Discussion

What is wealth management?

- How do you build a wealth management platform?
- What challenges do wealthy families have and how is that changing?
- How do they deal with family succession?
- How can RMs have a proactive, sensible and sensitive conversation with clients?
- What motivates HNW clients?
- What is fund selection and portfolio construction?
- Why is long-term investing so important?
- What have wealth managers in Asia learnt about distribution and product diversity?

- Children are the biggest focus Vietnam clients – why is that?
- Are all clients focussed on the 'future of their kids'?
- Big issue in Vietnam is that people want to move kids' education overseas

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Rohit Bhuta

Kimmis Pun  
Managing Director, Head of Private Banking, Singapore  
VP Bank

Gaurav Srivastava  
Head of Affluent Banking & Wealth Management  
VPBank

Jeroen Simons  
Director, High Net Worth Business Development  
Sun Life Financial

Pierre Vanrenterghem  
Manager, South East Asia  
Rosemont

12.55pm

Presentation  
Where Next ? Tax implications of residence planning for HNW families

Pierre Vanrenterghem  
Manager, South East Asia  
Rosemont

- Overview of selected tax regimes in Europe
- Implications of family relocation on their income tax, wealth tax, inheritance tax, etc.
- Potential structuring solutions

1.05pm

Lunch & Networking

1.50pm

Workshop

The World's Leading Residence - and Citizenship-by-Investment Programmes

Sylvie Ma  
Managing Partner  
Henley & Partners

- Overview of Immigration programmes
- The leading Citizenship-by-Investment Programmes in the Caribbean
- European Citizenship-by-Investment in Malta and Cyprus
- Attractive European Residence-by-Investment Programme

2.20pm

## Panel Discussion

### Building investment capability and the product manufacturing engine

- How does a HNW client invest?
- What's the availability of personal investment products (or lack of) in Vietnam and why the constraints and why
- Asset management companies - growing well and broadening distribution?
- What's the "typical" Vietnamese personal investment mindset.
- How is the fund market for retail developing?
- What's the client education journey?
- What's the risk of there being suitability issues? Is there a risk of mis-selling?
- Are there issues of market developing too quickly? How can you invest overseas? What can you do overseas? When will money be able to move offshore?
- Do foreign banks seem uninterested in selling funds in Vietnam?
- How will you encourage clients to invest longer term?
- How can you prevent redemptions?
- As asset management companies look to court distributors – is it foolish to compete on fees?

#### Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

#### Speaker

Xuan Dung Nguyen Thi  
Investment Director  
VinaCapital

Terence Hieu Tran  
Deputy CEO, Chief Distribution Officer  
VietFund Management

The Trieu Ngo  
Chief Executive Officer – Vietnam  
Eastspring Investments

3.05pm

## Refreshment & Networking

3.30pm

## Panel Discussion

### Are derivatives a good idea in Vietnam?

- What are derivatives?
- How might the market in Vietnam develop?
- Are derivatives a scary proposition in Vietnam?
- What's the potential role of derivatives in wealth management?
- How did the derivatives market develop elsewhere?
- How are derivatives and structured products used elsewhere in wealth management?

#### Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

#### Speaker

Xavier Burkhardt

Executive Director  
Leonteq

Bernard Lapointe  
Head of Research  
RongViet Securities

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

Olivier Robine  
Managing Director, Head of Equity and Commodity-Asia  
Commerzbank

4.15pm

Panel Discussion

What are the issues with the local capital market and how do you fix them?

- What's the role of Vietnam's capital markets (including both equity and fixed income), their development so far, and how capital flows in the system?
- How can we build more depth and breadth?
- Regulation and compliance – what are the challenges?
- What are your best and worst predications for this year?
- What are the opportunities in equity?
- What's the outcome for fixed-income and the development of structured fixed-income?
- How would you explain the biggest opportunities for investors in Vietnam today?
- How would you explain the biggest risks?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

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

Rainer Michael Preiss  
Executive Director, Investment Advisory  
Taurus Family Office

Thi Hang Nga Nguyen  
Chief Investment Officer  
Vietcombank Fund Management

Duong Vuong  
Deputy Managing Director  
VinaCapital

5.00pm

Forum Ends