Vietnam Wealth Management Forum 2019

8.30am	Registration

8.55am — Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.00am — Panel Discussion

Wealth management – grasping the opportunity

- What are the difficulties as well as advantages to launch a wealth management business in Vietnam?
- What are the catalysts to kick-start the domestic market? What are the roadblocks?
- Who are the players? What's their USP?
- Offshore / onshore. Where is the long-term opportunity?
- How has wealth management developed in Asia? How does Vietnam compare?
- What should the regulators do to help spur further development?
- How can you make money from building a wealth management platform?
- When will we see more products and solutions?
- Where are the biggest opportunities and challenges for insurance companies in Vietnam?
- Finding talent and training – does anyone do it well?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Gaurav Sharma
CEO & General Director
BIDV MetLife

Cong Thien Le
Deputy Chief Executive Officer
Ho Chi Minh Securities

Gauraw Srivastava
Head of Affluent Banking & Wealth Management
VPBank

Sanjay Chakrabarty
Deputy CEO, Head of Retail Banking
Orient Commercial Bank

Simon Lints
Chief Executive Officer, Singapore
Schroders Wealth Management

Minh Nguyen
Country Manager

Aetna

Bich Ngoc Nguyen
Head of Wealth Management Division
Shinhan Bank

9.45am Presentation
The New Age in Wealth Management: Build Your DIGITAL ALPHA

Abhijeet Singh Hazare
Head of Sales for Financial Services – South East Asia
3i Infotech

- Tap the Fortune at the bottom of the Pyramid: How technology can power Mass market, Millennials and Mass affluent market by providing the same personalized service and access to investment strategies available to HNWI.
- Wealth Management in an Information Age: Big data and advance analytics are on the cusp of transforming the Wealth management sector from new ways to engage, advice and service investors.
- Digital Revolution with Investor Experience at the Epicentre: Retooling wealth management for the new age investor with enhanced Investor experience.
- Human Touch in the Digital World: Hybrid Robo Advisors - a combination of technology & human based advisory models: A New way of Providing value and building Trust.

10.00am Head - to - Head Q & A

Investment Migration: Trends and Developments for HNWIs

Dominic Volek
Group Head of Private Clients
Henley & Partners

- Why is the Investment Migration industry booming?
- Why does Henley & Partners attend the Hubbis events?
- Where do our clients come from?
- Why do PBs/IAMs etc work with us?
- How can Henley & Partners help your HNWI clients?

10.10am Head - to - Head Q & A

How technology can drive more sales and deeper relationships

Dominic Gamble
Head of Asia Pacific
Wealth Dynamix

- The tech tools available to make RMs more powerful
- Use data to understand your clients better than ever
- Sell smart, sell tailored, sell more

10.20am Panel Discussion

Bringing it all together – Platforms, Technology and Products

- What are all the component parts you need to build a sustainable and profitable wealth management business?
- How do you build competency and capacity?
- What is a platform? What is custody?
- Who is currently active in mutual funds?
- What are the opportunities and challenges for Vietnam's asset management industry?
- What players and expertise do we need to create a wider variety of products to help the market develop and create diversification?
- What digital expectations do clients have?
- In Asia - how do 'funds' and 'investment products' get effectively distributed to clients?
- 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?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Hang Le Thi Le
Chief Executive Officer
SSI Asset Management

Yifei Li
Director
BlackRock

Damian Hitchen
Chief Executive Officer, Singapore
Swissquote

Bao Nguyen
Country Director Vietnam
GoBear

Dominic Gamble
Head of Asia Pacific
Wealth Dynamix

Jordan Lo
Head of APAC
IMTF

11.00am

Presentation
Cyprus Revitalised: How to Capitalize on the Island's reform?

Ioannis Ioannikiou
Legal Advisor
Casamont Cyprus

- Cyprus Investment Program
- Benefits of Cyprus when structuring your wealth
- Cyprus investment opportunities

11.10am

Refreshment & Networking

11.35am

Presentation
Technology Alone Won't Save You

Jason Hoang
Managing Director, Asia
IRESS

- Change is inevitable, but it's not always a comfortable ride
- What brings about real change?
- Transformation is never about technology
- The data advantage - The real digital transformation

11.45am

Presentation
Revisiting Family Governance

Stephanie Almeida
Trust Manager
Hawksford

Will your family destroy your wealth, or will your wealth destroy your family?

Family dynamics should always be considered by Wealth advisers when structuring a wealth succession plan. In this presentation Stephanie Almeida will consider relevant family issues surrounding the succession of wealth, be it family governance, what's in a family constitution, the impact of divorce, second marriages, balancing the expectations of children or the effects on family wealth of living longer.

11.55am

Presentation
Starting Private Banking in Vietnam

Pearl Pillaert
Associate Director, New Markets
Bordier & Cie

- Bordier's USP
- The Partnership with MB
- Building MB Private

12.05pm

Head - to - Head Q & A

GOLD – shining brighter every day

Christophe Numa
Managing Director
Bunker Group Gold & Silver

- Why is this a good opportunity today?

- What are the key reasons why you should invest in precious metals?

- Where should you keep your Gold?

12.15pm

Head - to - Head Q & A

The Rise of the Neo Banks

Reto Wolf
Head of Product Asia Pacific
additiv

- What's the rising mass affluent opportunity in SEA?
- Who is going to capture that opportunity?
- How Super apps and Neo Banks reshape the WM landscape
- How incumbent banks can approach this ever-expanding customer base of the future

12.25pm

Presentation
Why wealth managers need effective onboarding

Shane Meredith
Asia Director - FinTech & Wealth Advisory
Contemi Solutions

- How onboarding drives clients away
- Onboarding for intergenerational wealth management
- Wealth management for the digital economy
- What your onboarding technology needs to do

12.35pm

Panel Discussion

What are the most common concerns of families as they get wealthier?

- What are the challenges of dealing with wealthy clients?
- Curating the right solution for clients – what's thrown in the mix today?
- What is wealth structuring and planning?
- Finding the best advisory services and solutions – how do you maximise partnership with the right specialists?
- What specific trends are we seeing from Vietnamese clients?
- Are we ready for the intergenerational wealth transfer?
- Tax and transparency – problem or oppoportunity?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Kenneth Atkinson
Founder & Senior Board Adviser
Grant Thornton

Marcus Hinkley

Head Of Client Services
Hawksford

Dominic Volek
Group Head of Private Clients
Henley & Partners

Nguyen Ha Quyen Hoang
Founding Partner
LNT & Partners

1.15pm Lunch & Networking

1.50pm Room A – Workshop

Rearranging the banking landscape

- Evolution of change and the challenge to existing players; Who, how and when?
- How is technology evolving the industry?
- Example of digital platforms in wealth management / private banking

Damian Hitchen
Chief Executive Officer, Singapore
Swissquote

1.50pm Room B – Workshop

Global Citizens: Trends and Developments in Investment Migration

- Introduction to the Investment Migration Industry
- Citizenship-by-Investment: Travel and Settlement Freedom for HNWIs
- The world's leading Residence-by-Investment Programs

Alexis Tan
Senior Manager, Vietnam
Henley & Partners

2.30pm Room A – Workshop

What is CLM and how can it drive your business growth?

- The CLM journey: prospecting, onboarding, managing, engaging
- How CRM sits at the heart of CLM
- Exploring the efficiency gains for your internal teams and the insights for senior management

Dominic Gamble
Head of Asia Pacific
Wealth Dynamix

2.30pm Room B – Workshop

Emerging Technologies that are shaping the future of Wealth & Investment Management

- Blockchain in Wealth Management
- Rise of AI and Robotic Process Automation

Abhijeet Singh Hazare
Head of Sales for Financial Services – South East Asia
3i Infotech

3.10pm Refreshment & Networking

3.30pm Panel Discussion

Finding the best value today - investing in Vietnam

- Where are the opportunities for both local and international investors?
- What's the outlook for the financial markets in Vietnam over the next decade?
- What should Vietnam do to increase its attractiveness for the offshore wealth management industry – and encourage more investment in Vietnam?
- Vietnam is a key beneficiary of the current US/China trade war, but is this trend sustainable?
- Is the Vietnam's stock market fairly priced?
- Do Vietnam's stock market indices reflect what is happening in the broader market?
- What are the risks?
- Public equity vs credit vs private markets?
- Is there enough market depth and liquidity?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Andreas Vogelsanger
Chief Executive Officer
AFC Vietnam Fund

Rainer Michael Preiss
Executive Director, Investment Advisory
Taurus Family Office

Thi Xuan Dung Nguyen
Investment Director
VinaCapital

Lawrence Brader
Co-Porfolio Manager
PXP Vietnam Asset Management

Anh Tuan Phung
Managing Partner
VCI Legal

4.15pm Panel Discussion

What do you need to do to be a successful wealth manager?

- What product knowledge and skills do you need?
- What 'BAD' practices from other markets must we avoid?
- How can learning and professional development help you add value and differentiate your offering?
- Why is improving skills so important?
- Trusted adviser – what does that even mean?
- What are the client's needs?
- Growing your AUM - client retention, existing client referrals and prospecting.

Chair

Michael Stanhope

	Founder & Chief Executive Officer Hubbis Speaker Simon Lints Chief Executive Officer, Singapore Schroders Wealth Management K R Raju Founder & Adviser License Financial Planner MCG Group Dominic Gamble Head of Asia Pacific Wealth Dynamix
5.00pm	Forum Ends