

VIETNAM WEALTH MANAGEMENT FORUM 2022

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| 8.30am | Registration |
| 8.55am | <p>Welcome Address</p> <p>Michael Stanhope Founder & Chief Executive Officer Hubbis</p> |
| 9.00am | <p>Panel Discussion - in partnership with VinaCapital</p> <p>The Evolution of Wealth Management in Vietnam</p> <ul style="list-style-type: none">• What is your vision for wealth management in Vietnam?• What growth potential lies ahead?• How is the client base evolving, and how are clients' needs and expectations developing?• What are the challenges to further growth? <p>Chair</p> <p>Eric Levinson Deputy Managing Director, Head of Business Development VinaCapital</p> <p>Speaker</p> <p>Gaurav Srivastava Managing Director VNDirect</p> <p>Thu Phuong Ngo Board Member of VietinBank Insurance (VBI) VietinBank</p> |
| 9.30am | <p>Presentation</p> <p>Citizenship and Residency – Opportunities and Trends for the year ahead</p> <p>Jacky Poh Deputy Head Southeast Asia Henley & Partners</p> <ul style="list-style-type: none">• Alternative residences or citizenships in times of Political Uncertainty• Domicile diversification – a new asset class• An Introduction to Henley & Partners Education Service |
| 9.45am | <p>Panel Discussion - in partnership with Henley & Partners</p> <p>What can we learn from developed private wealth markets in Asia?</p> <ul style="list-style-type: none">• What are the 'real' challenges that UHNW clients face today?• As client's wealth grows – how can we build a compelling local market proposition?• How can you structure a local private bank, so you offer value to clients beyond |

investments?

- What do UHNW clients actually want from a private wealth manager?
- How have regional wealth centres developed and what do they offer wealthy families?
- What is a Family Office and what other structures exist for investment and wealth transfer?

Chair

Jacky Poh
Deputy Head Southeast Asia
Henley & Partners

Speaker

Carolyn Leng
Managing Director
Bordier & Cie

Bao Nguyen
Founder & Managing Partner
Vietnam Capital Advisors

Hanzhi Ding
CEO & CIO
BIL Wealth Management

10.15am

Presentation
Vietnam – Why Now & How Vietnam Can Decouple from Global Markets

Thu Nguyen
Managing Director, Head of Investment
VinaCapital

- Strong economy and benign inflation
- Urbanization and emerging middle class to drive market in next 10 years
- Attractive valuation, opportunities for active investors

10.30am

Panel Discussion - in partnership with VinaCapital

How are clients engaging investment opportunities today?

- How is the investment proposition developing? How can we add more depth and sophistication?
- What investment products do clients want?
- How has the mutual funds industry developed and what's next?
- What are the challenges to moving this forward?
- What must distributors do to embrace this opportunity?
- Is it realistic to offer 'advice' to clients in Vietnam?

Chair

Eric Levinson
Deputy Managing Director, Head of Business Development
VinaCapital

Speaker

Pramoth Rajendran
Head of Wealth and Personal Banking

HSBC Bank

Quang Vu Le
Founder & CEO
C99 Capital

11.00am Refreshment & Networking

11.30am Presentation
Customer-centricity in wealth management: lessons learned

Grzegorz Prosowicz
Head of Consulting and Product Management
Comarch Capital Markets

- Banking today and tomorrow: what does make banks privileged?
- Personalization in practice.
- How to create value and drive customer loyalty?

11.45am Head - to - Head Q & A

Parida Leelaniramol
Sales Director
Comarch

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

12.00pm Panel Discussion

How are firms accelerating their digital transformation?

- It's a young and digitally savvy population – but older people have the majority of wealth. So how is the opportunity evolving?
- How do you use technology today?
- What does digitalization mean to you and your firm?
- Where are you up to in this journey?
- What is coming next in the world of digital technologies and services that will further enhance the wealth management offering, and how can those improve the proposition?
- How do wealth managers make the right decisions, firstly on what areas to focus on, and then which solutions to adopt and which technology partners to work with?
- What progress are Digital Wealth Managers making? Are they challenging traditional wealth firms?

Chair

Brook Taylor
Chief Executive Officer - Asset Management
VinaCapital

Speaker

Huy Nghiem
Founder & CEO
Finhay

Mukesh Pilania
Head of Retail Digital Banking
Techcombank

Quang Huy Le
Director, Digital Transformation
PwC

12.30pm

Presentation

What lessons could we learn from the evolution of wealth management in Asia in the design and delivery of a digital-led wealth platform in Vietnam?

Eric Kuah
Head of Business Development - Asia
IRESS

- As Asia evolves from the traditional RM-led advisory model into a Digital-led model, what are some of the lessons we can draw as we zero in on Vietnam's young and dynamic wealth management landscape?
- What are the products and delivery channels that would allow us to capitalise and seize the opportunities in Vietnam? Is the RM model obsolete?
- What are some of the considerations in terms of an operating model for a digital wealth platform? How does the client's digital journey look like? What are some of the digital capabilities to build for differentiation and what components do we rent for enhanced operating leverage?

12.45pm

Presentation

Key Tax Planning Considerations

Nam Nguyen
Managing Partner
Kreston

- Trends in Vietnam
- What you/your business needs
- Wealth management & estate planning
- Key tax planning considerations
- How advisors add value

1.00pm

Lunch & Networking

2.00pm

Forum Ends