Thailand Wealth Management
Forum 2012

hubbis

Tuesday 19th June
Grand Hyatt Erawan, Bangkok

BARCLAYS

bravura
solutions

Labuan IBFC
International Business
and Financial Centre, Malaysia

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TREEDOM
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Who is Hubbis?

Launched in March 2010, Hubbis is the leading provider of content and online learning for Asia's Wealth Management & Private Banking Industry.

This is achieved through a highly-functional and relevant training and information portal – with a holistic suite of Wealth Management Training Modules and a cutting-edge Learning Management System – that enables relationship managers (RMs) and financial advisers to become more successful in the region's competitive landscape. And at the same time fulfill their continuing professional development obligations.

Our educational content and other tools are targeted, independent, timely, strategic and Asia-focused. The site is mainly focused on developing skills, product knowledge, and understanding.

Through this practical advice, analysis, insight and information, users gain what's necessary to offer suitable and trusted advice to their clients.

For more information, please contact:

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Welcome

We are delighted to be hosting our inaugural **Thailand Wealth Management Forum 2012** in Bangkok – which will be a first-of-its-kind in Thailand, and the the leading get-together for the domestic industry.

It will include senior market participants from Thailand and across Asia, with presentations and panel discussions on key issues, opportunities and challenges relating to people, processes, products, strategy and platforms.

Our ambition is to gather the most influential participants in the Thai wealth management community.

Ultimately, this is designed for senior management, product gatekeepers and investment advisers - as well as key frontline staff and personnel in operations, technology, HR, compliance and other important roles at the top private banks, consumer banks, IFAs, securities firms, regulators, industry associations and other industry participants.

You can join us for either the morning or the afternoon segments - or can come along for the whole day. And we will give you a certificate to prove your attendance. Lunch is also included.

Key reasons why you will benefit from attending this forum:

- It is free for anyone at a private bank, a consumer bank, an independent advisory firm or any other type of wealth management organisation
- You get an authenticated certificate of attendance
- You learn about how international best practices in building winning wealth management businesses and platforms
- You get practical insight into how you can do your job more productively and efficiently
- You learn which products are suitable for your clients - and where they fit in their portfolio
- You can understand some of the latest industry and investment challenges - and how you can overcome them
- You can network with peers in an informal and independent setting
- It is an enjoyable and effective learning experience through being interactive and engaging

There are no non-sponsoring product manufacturers, professional services firms or vendors who can attend.

We look forward to seeing you at the event - and thank you for your support.

Michael Stanhope
Chief Executive Officer
Hubbis

Agenda at a glance

9.00am to 5.05pm

TIME	TOPIC
9.00am - 9.05am	Welcome Address
9.05am - 9.55am	Panel Discussion Building a successful wealth management service in Thailand
9.55am - 10.35am	Presentation Business and technology innovation - a case study in success
10.35am - 10.55am	Refreshments & Networking
10.55am - 11.45am	Panel Discussion Learning from international wealth management models
11.45am - 12.10pm	Presentation A foundation for wealth planning
12.10pm - 12.35pm	Presentation Wealth management - best practices from Singapore
12.35pm - 1.25pm	Lunch
1.25pm - 2.15pm	Panel Discussion The importance of asset allocation and the product mix
2.15pm - 2.40pm	Presentation Short-dated investment ideas
2.40pm - 3.05pm	Presentation Investing in sustainable forestry as a true alternative
3.05pm - 3.25pm	Refreshments & Networking
3.25pm - 4.15pm	Panel Discussion Getting your value proposition and client experience right
4.15pm - 4.40pm	Presentation Sales skills: developing a strategy for how we grow our business
4.40pm - 5.05pm	Presentation How to build a market-leading technology platform in wealth management
5.05pm Close	Forum Ends

Agenda

8.40am **Registration**

9.00am **Welcome Address**

Michael Stanhope
Chief Executive Officer
Hubbis

9.05am **Panel Discussion**
Building a successful wealth management service in Thailand

- What does the wealth management market look like in Thailand at the moment, and how might it develop?
- What are the challenges in developing a more holistic offering?
- How do you acquire clients?
- What are the main challenges in relation to people, processes, platforms and educating clients?
- What are the biggest regulatory issues in the industry?
- What needs to be done to better align interests of clients and advisers?
- How can clients manage the relationships with their bankers and maximise their wealth?
- What are the component parts of getting a private banking platform right?
- How is the fee model evolving generally in Thailand? How suitable is a fee-for-service model for HNW clients?
- Many wealthy Thais have private banking accounts in Singapore or Hong Kong? What more can be done for them in offshore markets?
- Do you expect to see more private banks setting up onshore operations in Thailand? Is there enough depth to the market to support this?
- What can be learnt from foreign private banks?
- As banks look to start scaling their private banking platforms, what are some of the issues they face?

Chair

Michael Stanhope
Chief Executive Officer
Hubbis

Panel Members

Montree Sornpaisarn
Chief Executive Officer
Maybank Kim Eng Securities (Thailand)

Kris Chantanotoke
Executive Vice President, Wealth Management and Bancassurance Division
Bank of Ayudhya

Teera Phutrakul
Founder, JT Financial Planners
Chairman, Thai Financial Planners Association

Samart Rusmeerojwong
Senior Vice President
Thai Military Bank

Mark Smallwood
Managing Director, Head of Wealth Management Solutions, Asia Pacific
Deutsche Bank Private Wealth Management

Peter Lee
Managing Director
Veco Invest Asia

9.55am **Presentation**
Business and technology innovation - a case study in success

Naomi Ballantyne
Managing Director
Partners Life

Roland Slee
Managing Director, Asia Pacific
Bravura Solutions

- A case study to show how innovative technology and strategic thinking can enable a highly-successful wealth management and insurance business
- Partners Life is a modern, innovative life insurer that entered the New Zealand market in early 2011 with state-of-the-art technology and highly-efficient business processes
- This fast-growing business is underpinned by a next-generation wealth management platform that was implemented in just four months prior to business launch, and allowed Partners Life to write its first million dollars of premiums within the first three weeks of operation. A year later Partners Life is broadly recognised as a disruptive new entrant, reshaping the New Zealand life insurance market

10.35am **Refreshments & Networking**

10.55am **Panel Discussion**
Learning from international wealth management models

- What are the industry best practices in more developed wealth management markets in Asia, especially Hong Kong and Singapore?
- What are the processes, systems and technology involved in creating leading offerings in these markets?
- What is the approach to product development?
- What is international best practice in talent management and development?
- What product offerings exist overseas for different client segments?
- Where are the biggest gaps between overseas markets and Thailand in terms of the product offering?
- What lessons can be applied in the Thai context?

Agenda

Chair

Michael Stanhope
Chief Executive Officer
Hubbis

Panel Members

Urs Brutsch
Managing Partner & Founder
HP Wealth Management

Richard Piliero
Managing Director, Regional Executive
EFG Bank

Carolyn Leng
Head of Private Banking
CIMB Private Banking

Philipp Piaz
Partner
Finaport

Alex Jagmetti
Head of Asia Pacific
Gonet & Cie Group

Kevin Ho
Head of Portfolio Management, Private Client Group
SJS Capital Management

11.45am **Presentation**
A foundation for wealth planning

Hiu Chee Fatt
Trust Advisor
Labuan IBFC

- The wealth planning process
- What are the risks and threats?
- What can be done to manage the threats?
- Planning ahead to avoid disasters

12.10pm **Presentation**
Wealth management - best practices from Singapore

Nithi Genesan
Head of Singapore
ComplianceAsia

- Looking at the different wealth management models in Singapore
- Recommendations and best practices for financial advisers
- Brief overview into compliance regulations applicable to wealth managers

12.35pm **Lunch**

1.25pm **Panel Discussion**
The importance of asset allocation and the product mix

- What can be done to expand the product range in Thailand and help the domestic market grow further?
- Where is the biggest demand among clients?
- What are the best ways to provide enhanced returns?
- How can the market cater effectively to wealthy Thais via asset allocation and diversification?
- How can local banks move beyond the product-pushing culture which has defined the market to date?
- How can you educate clients about an asset allocation model – rather than the hunt for immediate returns?
- To what extent do the commission and revenue models in Thailand need to change for the market to develop further?
- In general, how well educated are Thai clients?
- What is the approach to portfolio construction in more developed wealth management markets, such as Singapore and Hong Kong?
- How can advisers better set expectations, and what is reasonable in terms of market returns?

Chair

Michael Stanhope
Chief Executive Officer
Hubbis

Panel Members

Manaviga Piyapimook
Senior Vice President, Head of Retail Deposit and Investment Products
Kasikorn Bank

Teera Phutrakul
Founder, JT Financial Planners
Chairman, Thai Financial Planners Association

Andreas Vogelsanger
Partner
MBMG Group

Pote Harinasuta
Executive Vice President of Private & Institutional Business
SCB Asset Management

Alistair Meadows
Regional Director, International Capital Group, Asia Pacific
Jones Lang LaSalle Property Consultants

Agenda

2.15pm **Presentation**
Short-dated investment ideas

Yishi Lian
Assistant Vice President, EM Structuring
Barclays

- Credit-linked notes
- Variation of credit-linked notes
- Local currency deposit-linked notes
- Short dated bank MTNs or CDs in USD

2.40pm **Presentation**
Investing in sustainable forestry as a true alternative

Antony Bell
International Investment Manager
Treedom Investments

- History of forestry as an asset class
- So why is forestry considered to be low risk?
- The future of sustainable forestry investments

3.05pm **Refreshments & Networking**

3.25pm **Panel Discussion**
Getting your value proposition and client experience right

- Are firms really prepared to make the required commitment to growing a wealth management business until they can make a profit, given this will likely take many years?
- What are the general expectations and requirements of Thai private clients?
- How has this been changing?
- How can you differentiate your offering given the increasing competition?
- What are the component parts of getting a private banking platform right?
- What is the real differentiator – product, systems, process, people or culture?
- How can you establish a wide distribution platform and forge links with offshore players to offer a diversified offering and maximise the profitability of your business?
- What technology is needed to provide an effective solution for clients?

Chair

Michael Stanhope
Chief Executive Officer
Hubbis

Panel Members

Tay Han Chong
Managing Director, Head of Business, Personal Financial Services, Business Banking, and Commercial Banking
United Overseas Bank (Thai)

Thanomphong Pathomsak
Managing Director
Merchant Partners Securities

Mykolas Rambus
Chief Executive Officer
Wealth-X

David Edmonds
Partner
MBMG Group

Roland Slee
Managing Director, Asia Pacific
Bravura Solutions

4.15pm **Presentation**
Sales skills: developing a strategy for how we grow our business

David MacDonald
Managing Director and Head of Consulting & Learning Solutions
Hubbis

- The challenges we face in growing our business
- Being different, being professional, being strategic
- Developing a sales strategy – routes to market
- Developing a sales plan – turning thinking into action
- Developing existing client relationships – gaining quality referrals
- Developing networks through centres of influence

4.40pm **Presentation**
How to build a market-leading technology platform in wealth management

Reto Merazzi
Managing Director and Head of Technology Solutions
Hubbis

- What do technology platforms at the world's biggest and best private banks look like?
- What are the components of a high-quality, reliable and efficient technology platform - from front to back?
- How can you put this into practice?
- Common implementation challenges - and how to address them
- Why technology is critical to your future success

5.05pm **Forum Ends**