THAILAND WEALTH MANAGEMENT FORUM 2024

8.30am Registration

8.55am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.00am Panel Discussion

Trends, Opportunities and Challenges for the Industry

- Are we doing enough to engage business families? Are business families actively considering or being advised to exit the business? Are we discussing the role of a Family Office in transitioning from business to financial wealth?
- Is there client demand to hold or continue to hold wealth offshore? Which financial centre(s) do clients typically prefer: Singapore, Hong Kong and/or Dubai?
- How have clients reacted to CRS reporting, do clients understand the rules? Are clients concerned about the privacy implications? Has the CRS lead to repatriation of funds back to Thailand or a flight to non-financial assets?
- How have clients reacted to changes in the taxation of foreign source income? Have there been any changes to investment management as a result of the changes?
- What are the key training and development needs for relationship managers? What are the key attributes of a successful relationship manager?
- What is the future of the private wealth management industry? Tech enabled, relationship driven or commoditization? Is it possible to provide HNW services at scale?
- Key priorities for the year ahead?

Chair

Zac Lucas
Partner – International Private Wealth
Spencer West LLP

Speaker

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

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

Lucie Hulme
Chief Executive Officer & Partner
TriLake Partners

Ittapat Akaraveepakin
CEO
Wealth Platforms Group

9.30am Presentation
Vietnam - Asia's Next Tiger Economy

Eric Levinson
Deputy Managing Director, Head of Business Development
VinaCapital

- Why Vietnam Now?
- Key Themes
- Valuations

9.45am Panel Discussion

Evolving the platform and proposition. Improving the client experience

- Private wealth managers constantly face challenges related to regulation, competition, and changing customer expectations, but they also have significant opportunities to leverage technology for digital transformation, better customer experiences, and increased efficiency. What is the future of wealth management in the digital age?
- What is the role of technology and digital tools in modern wealth management for HNW clients?
- Success Stories and Case Studies - Digital Transformation Strategies
- What are the best Client-Centric Approaches?
- Artificial Intelligence or Emotional Intelligence – which is more important?
- What's the priority? How are you allocating your resources? Enhanced Customer Experience, Data Analytics, Automation, and Fintech Partnerships?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Evrard Bordier
CEO and Managing Partner
Bordier & Cie

Dr. Silvio Struebi
Partner
Simon-Kucher Global Strategy Consultancy

Darell Miller
Managing Director APAC
Wealth Dynamix

10.15am Presentation
Millennials: Reshaping the Future of Wealth Management in Asia

Endang Werang
Business Development Manager
Comarch

- Fun fact about Millennials
- New way of getting the message heard
- Attract, onboard, engage, retain – getting things done in the right way

10.30am Panel Discussion

Wealth Planning and Structuring – Understanding the needs of our clients

- What tax developments can we expect in the year ahead? Will Thailand introduce CFC rules? Will Thailand introduce corporate residence rules "Place of Effective Management" rules? Will Thailand introduce CRS Mandatory Disclosure Rules and/or Crypto Asset Reporting Framework? Will Thailand change or increase its Inheritance Tax Rates?
- What are the top mistakes or misconceptions about the CRS reporting? Do clients fully understand the CRS? Are Thai financial institutions correctly implementing the CRS? Is there a need for further training and development of private wealth professionals?
- What are the key misconceptions or mistakes about the creation and use of an international trust, for instance a trust created in Singapore? What is a "Private Trust Company" (PTC) when is the best time to use a PTC? When should a PTC not be used?
- Why do families create Family Offices? When is it the best time to create a Family Office?
- For business family succession and governance planning is a family charter best? What are the alternatives? When is the right time for a family to consider a sale of the business?
- What are the major international regulatory initiatives to consider in the year ahead?
- What is the likely effect of the joint OECD FATF report on misuse of Citizenship and Residence by Investment Schemes?

Chair

Zac Lucas
Partner – International Private Wealth
Spencer West LLP

Speaker

Jonathan Stuart-Smith
Tax Partner
Mazars

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

Emile de Marsac
Associate Director Private Clients
Henley & Partners

11.00am	Refreshment & Networking

11.30am Presentation
How IMTF Siron One can digitize your CLM/Compliance technology and drive business growth.

Jordan Lo
Head of APAC
IMTF

- Dynamic KYC triggering >> Reduction in KYC review friction and increased efficiency.
- Modern CLM platform >> Accelerating size and speed of onboarding.
- Real-time AML / 360 >> Comprehensive data at the fingertips of the front office.

11.45am Presentation
2nd Passport; Investment Opportunity – Insurance Policy – Asset Class

Andrew Raming
Senior Manager Business Development
Henley & Partners

- Breakdown barriers to entry
- “a thing providing protection against a possible eventuality”
- The new asset class

12.00pm Panel Discussion

Curating a Relevant and Professional Investment & Advisory Proposition for Private Clients

- What are the local market and also international investment scenarios, the outlook ahead, and where they see the key opportunities?
- In terms of allocations to mainstream public market assets (equities and fixed income), are HNW clients more focused on active or passive strategies?
- What sort of demand amongst HNWIs for private and alternative assets, and what is the outlook?
- Is ESG a key driver for investment choices amongst wealthy private clients? Why, or why not?
- Is there strong local demand amongst HNW clients for fee-based advisory, or discretionary portfolio management, or do clients there tend to want to retain control of their investment decisions? What are the trends?
- Generally, how is the wealth management industry evolving and adapting to deliver the best investment and advisory offerings to HNW clients?
- Is there any interest by clients in digital assets? What trends and developments are we seeing - How can HNW clients access this opportunity?

Chair

Alex Ng
Head of Intermediary Sales, Asia
Janus Henderson Investors

Speaker

Paul Gambles
Director
MBMG Group

Tim Niranvichaiya
Managing Director, Thailand
StashAway

Kok Hoe Wong
Chief Growth Officer
Chintai

Yingyong Chiaravutthi
Head of Investment
Eastspring Asset Management

12.30pm Presentation
Time to Go Bargain Hunting in China?

Larry Kwok
Director, Sales & Distribution
Premia Partners

- Are we at the bottom yet – is deep value cheap enough?
- The next China is China - what does this mean and what are the important emerging trends to monitor?
- Where will you find value and value for growth in the next 12 months?
- Which ETFs are the best implementation tools?

12.45pm Presentation
Scaling Without Pain – Can You Have Your Cake and Eat It Too?

Darell Miller
Managing Director APAC
Wealth Dynamix

- Why breaking the chain between revenue and costs is crucial for Wealth Managers and Private Banks that want to scale profitability
- Why does this matter now?
- How do you break the chain and enable relationship managers to better serve their clients?
- Scale, eat, repeat!

1.00pm Head - to - Head Q & A

Parida Leelaniramol
Sales Director
Comarch

- How are wealth managers in Malaysia enhancing their digital capabilities?
- What are some of the trends we are likely to see in 2024?
- How does Comarch help with the process of digital transformation?

1.10pm Lunch & Networking

2.00pm Forum Ends