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Wealth Management Products

4.69 of 5

According to the survey conducted in early 2015 by Zocial Inc., Thai people viewed wealth management as a matter of great importance.

Today we will talk about ...

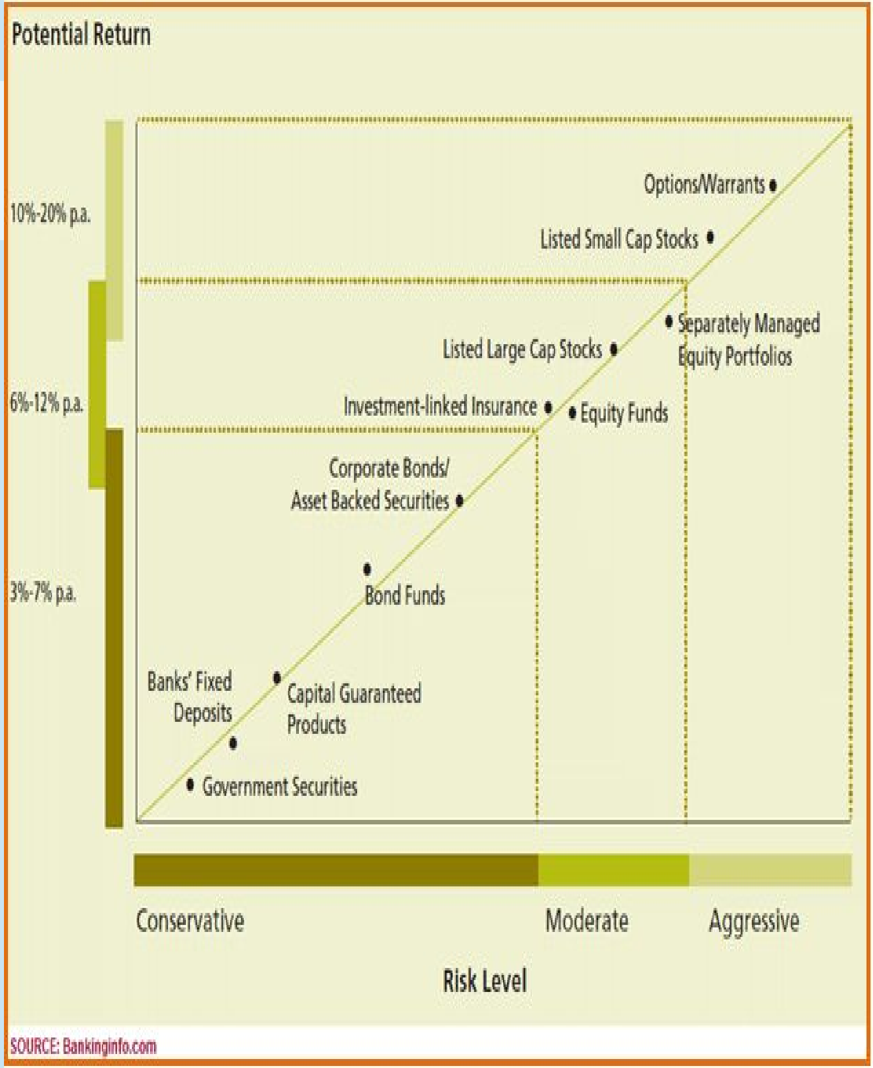
- What is Wealth Management
- Type of WM products
- Trends of WM 2016

What is Wealth Management

- Managing your wealth or surplus funds to achieve a financial goals
- Not only Individual but also Businesses
- More than just investing
    - managing your income and expenses, planning your retirement, review your insurance policies, tax planning.

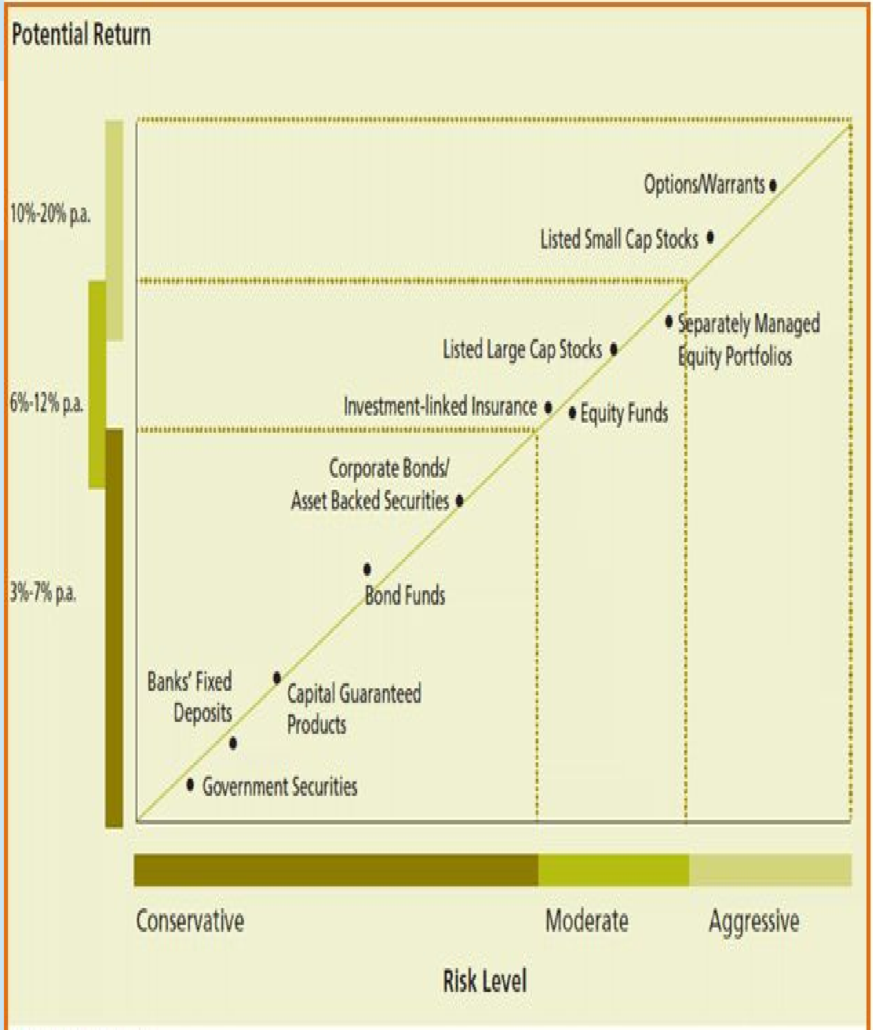
Type of WM Products

- Fit every thinkable risk/reward potential
- Product preferences will depend on each investor risk appetite



Type of WM Products

1. Money Market Accounts (MMAs)
2. Certificates of Deposits (CDs)
3. Money Market Funds
4. Bonds
5. Equities (Stock)



SOURCE: Bankinginfo.com

Type of WM Products

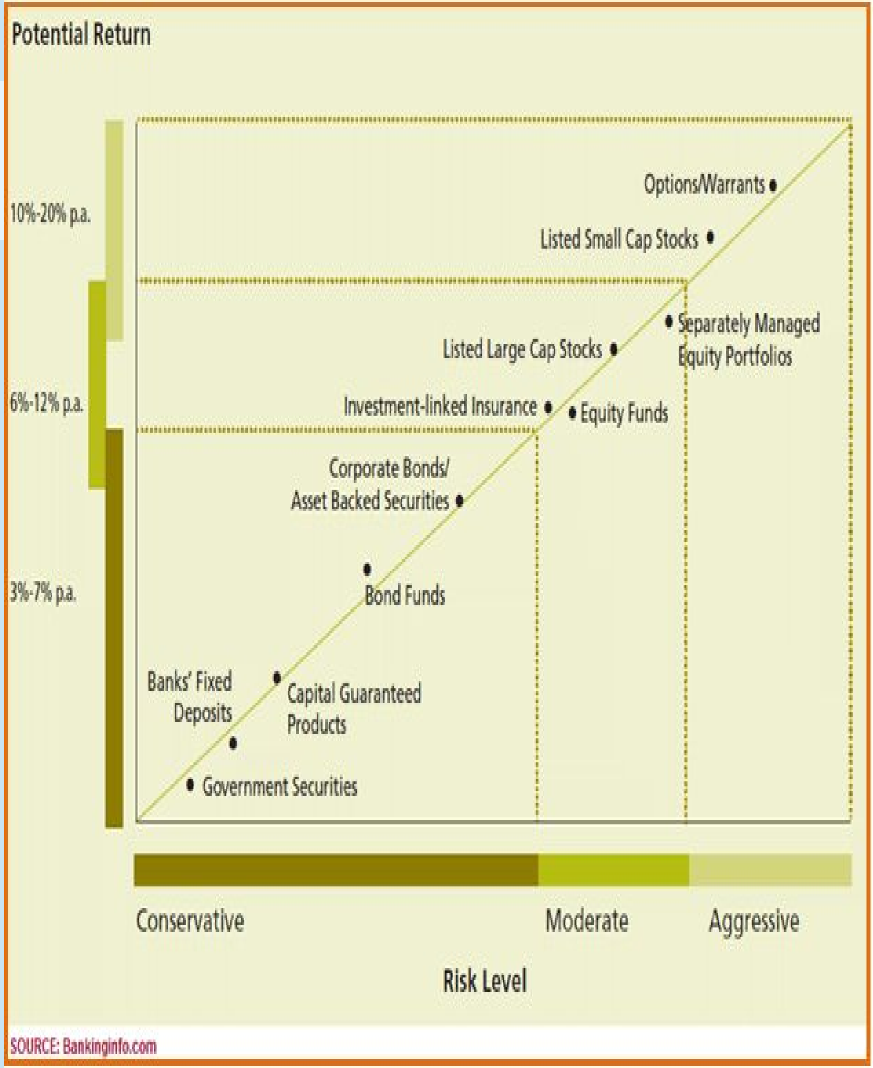
6.Mutual Funds

7.Exchanged Traded Funds (ETFs)

8.Structured Products

9.Private Equity Funds

10.Hedge Funds



5 Key trends for 2016

1. A (EVER) HEAVIER REGULATION
2. BANKS INCREASINGLY ADOPT FINTECH TECHNOLOGIES
3. YOUNG HNWI ARE A GROWTH DRIVER
4. DIGITALISATION CONTINUES
5. CYBERATTACKS MULTIPLIE

The investment risk.
Investor should study information before making decisions

Q&A