

KBank PRIVATE BANKING





## **A PHILOSOPHY OF 'PERFECT WEALTH'**

'Perfect Wealth' is wealth with happiness.  
Happiness that comes from a worry-free life.

## **A DESIGN OF ‘INTERNATIONAL COMPREHENSIVE WEALTH MANAGEMENT SERVICES’**

All-inclusive services are well designed with international standards to cover all wealth related needs.

Every step of wealth from preserving, growing and passing on.

Every kind of asset including financial assets, family business, real estate etc.

Every opportunity of investment both onshore and offshore.

To fulfill needs and relieve your worries.









Our international comprehensive services include:

**FAMILY WEALTH PLANNING SERVICES**

To efficiently preserve and pass on family wealth and legacy.

**INVESTMENT ADVISORY SERVICES**

To sustainably grow your wealth.

**PRIVILEGES**

To fulfill other aspects of life for your Perfect Wealth.

## **FAMILY WEALTH PLANNING SERVICES**

The in-depth advisory tailored specifically to assist you on preserving and passing on your family wealth.

Our services include:

Family Continuity Planning

Financial Asset, Liability and Risk Management

Asset Holding Structures

Succession Planning

Philanthropy

Family Office











## **INVESTMENT ADVISORY**

We provide a systematic advisory starting from structuring a client's wealth into '3 portfolios' according to different objectives:

Liquidity Portfolio

Long-term Investment Portfolio

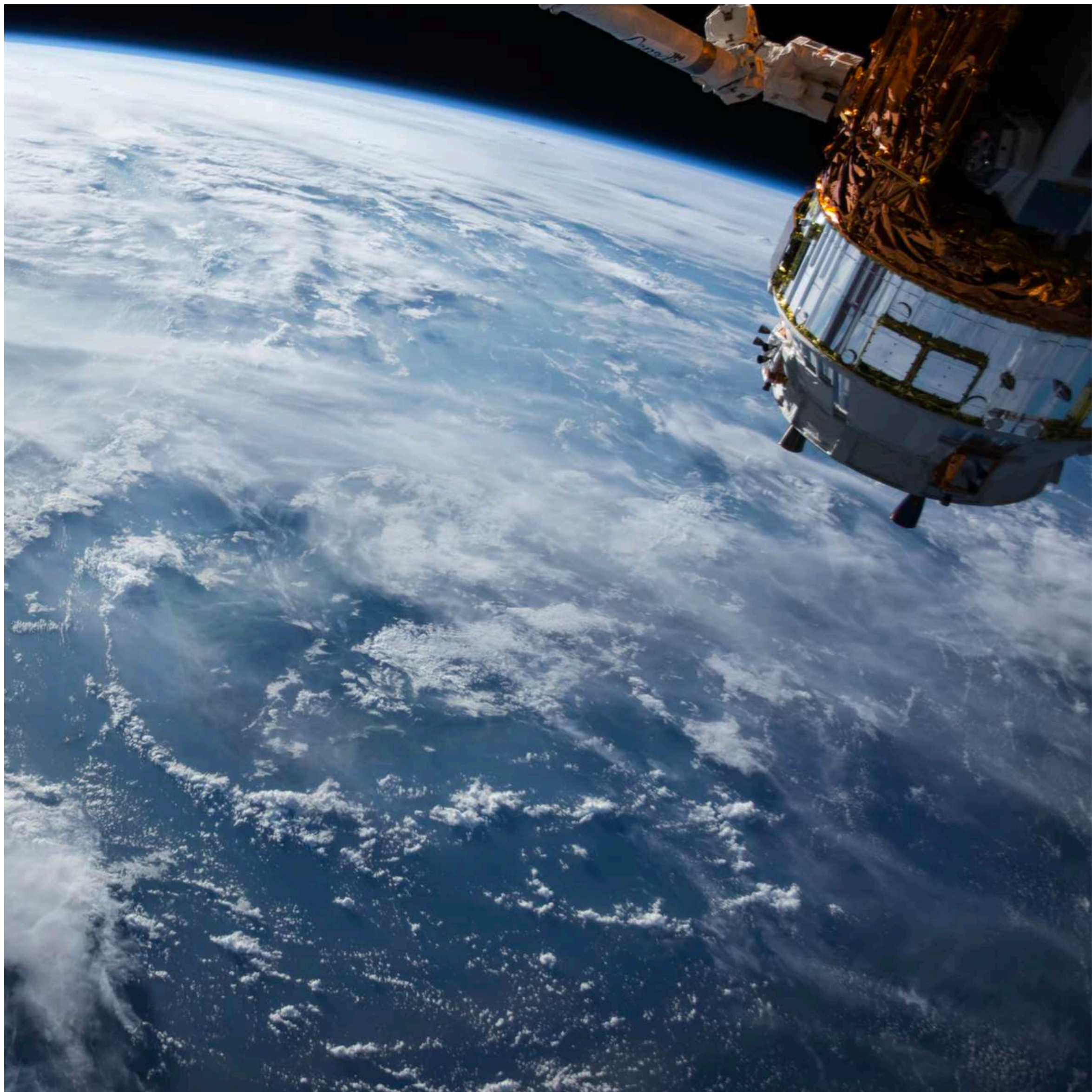
Aspiration Portfolio

## **OUR INVESTMENT PRINCIPLES**

KBank Private Banking team is adept at serving all 3 portfolios by collaborating with teams of specialists with a focus on long term investment portfolio

- Aiming to generate long term sustainable returns while being exposed to limited risk via ‘Risk-Adjusted Return Optimisation Approach’
- Applying risk diversification via an asset allocation strategy to efficiently manage portfolio risk.
- Offering the Best-in-Class financial products and solutions from various global financial institutions, customised to suit the client’s demand.
- Monitoring and conducting portfolio rebalancing according to changing economic situations and cycles.











## **PRIVILEGES**

World-class privileges exclusively selected for you.

Accessibility to World-Class Knowledge

Exclusive Business Networks

Lifestyle Privileges

## **AN ALLIANCE THAT ENSURES AN INTERNATIONAL STANDARD**

In 2014, Kasikornbank forged the first alliance of its kind in Thailand with Lombard Odier. We will draw upon Lombard Odier's international investment and family services expertise, and its two-century track record of innovation, to provide the best quality advisory and services for our local private clients.

### Our quality components:

- A global network of family wealth planning experts with international experiences and local knowledge.
- A team of global and local economists and investment strategists working seamlessly to cover global investment opportunities.
- Investment products well designed to incorporate necessary risk management features.
- Private bankers locally and internationally trained to cover all wealth issues.







rethink everything.



**LOMBARD ODIER**

LOMBARD ODIER DARIER HENTSCH





**LOMBARD ODIER**  
LOMBARD ODIER DARIER HENTSCH

## **OUR STRATEGIC ALLIANCE PARTNER**

Headquartered in Switzerland, Lombard Odier is an innovative bank of choice for private and institutional clients seeking a tailored approach to wealth and asset management. It aims to preserve and grow its clients' assets, guided by a simple philosophy: 'rethink everything'. Lombard Odier's agile responses to changing economic and political conditions have delivered over 220 years of stability through 40 financial crises.



# **KBank PRIVATE BANKING AWARDS & RECOGNITIONS**

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## **2019**

Best Asset Management Award - EUROMONEY

Best Private Bank - Thailand Domestic - ASIAN PRIVATE BANKER

Best Private Bank in Thailand - EUROMONEY

Best Private Bank in ASEAN - THE DIGITAL BANKER

## **2018**

Best Research and Asset Allocation Advice - EUROMONEY

Best Succession Planning Advice and Trusts - EUROMONEY

Best Private Banking Thailand Domestic - ASIAN PRIVATE BANKER AWARDS

Best Private Banking in Thailand - GLOBAL PRIVATE BANKING AWARDS

Best Private Bank in Thailand - WEALTH & SOCIETY

## **2017**

Best Private Banker for Customer Service in Asia - PWM AND THE BANKER MAGAZINE

The Best Private Banker in Thailand - THE ASIAN BANKER

Highly Commended: Best CX Wealth Management - PRIVATE BANKER INT'L  
AND RETAIL BANKER INT'L

Best Private Bank for Ultra High Net Worth Clients - EUROMONEY

## **2016**

Best Private Banker in Thailand - PWM AND THE BANKER MAGAZINE

Asset Management Award - A.I. GLOBAL

Best Private Banking Services Overall in Thailand - EUROMONEY

Ultra High Net Worth Clients (Greater than US\$ 30 Million) - EUROMONEY

Investment Banking Capabilities - EUROMONEY

Best Private Banking Services Overall in Thailand - EUROMONEY

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**2015**

Best Wealth Management Provider, Thailand - WORLD FINANCE WEALTH MANAGEMENT AWARDS

**2014**

Best Wealth Management Provider Thailand - WORLD FINANCE WEALTH MANAGEMENT AWARDS

**2013**

Best Local Private Bank in Thailand - EUROMONEY

**2012**

Best Local Private Bank in Thailand - EUROMONEY

**2010**

Best Private Bank Awards for Thailand - FINANCE ASIA PRIVATE COUNTRY AWARDS

**2009**

Best Private Wealth Management Bank in Thailand - ALPHA SOUTHEAST ASIA

## DISCLAIMER

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*In strategic alliance with*



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