HUBBIS ASIAN WEALTH SOLUTIONS FORUM 2022

8.30am	Registration

8.55am — Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.00am — Panel Discussion

How will Singapore continue to position itself as a wealth management centre?

- What is the current state of the Singapore wealth management market, and what are the key advantages it offers regional and global clients?
- How are client requirements changing, why and is Singapore ahead of the game?
- What do UHNW clients expect of their advisers and the professional services firms they work with?
- What have the government and the regulators/authorities been doing to widen the appeals of Singapore for the location or expansion of single-family offices? In short, why should families set up a SFO in Singapore? What's likely to change?
- Are there any issues to further growth? Talent / cost / taxes?

Chair

Gerard Chinniah
Managing Director – Singapore
Equiom Group

Speaker

Woon Shiu Lee
Managing Director & Group Head of Wealth Planning, Family Office & Insurance Solutions
DBS Private Bank

Lee Wong
Head of Family Services, Asia
Lombard Odier

Rohit Ganguli
Head of Wealth Planning Asia
EFG International

9.30am — Presentation
Use cases for PPLI in Asia

Roger Chi
Managing Partner
1291 Group

- Examples - China, Taiwan, Indonesia Thailand
- Privacy, asset protection and tax optimisation
- Its role in next generation planning

9.50am	Presentation Capturing untapped HNW Sales Opportunities Christopher Tanchou Head of Business Development Swiss Life Claire Tan Business Development Director, Global Private Wealth Swiss Life • Create awareness of choice; Give clients what they need • Discuss Perception vs Reality • Real-life scenarios of how insurance solutions meet evolving clients' needs
10.10am	Presentation Citizenship and Residency – Opportunities and Trends for the year ahead Nirbhay Handa Group Head of Business Development Henley & Partners • Alternative residences or citizenships in times of Political Uncertainty • Domicile diversification – a new asset class • Real estate investment rankings for migration
10.30am	Panel Discussion Residency & Citizenship – Tracking Key Trends for the Region's Wealthy • How are clients changed their thinking about where they live and their mobility post-covid? • How and where does investment migration align with estate and legacy planning? What are the holistic solutions for migration and citizenship? Who looks after your issues when you have moved? • What are the key global mobility and investment migration trends have emerged in the past year or two since the pandemic struck? • Where is the demand emanating from these days, and how does that compare with historical trends? • Is Asia a source of outward activity, or inward activity, or both? Why? • Within Asia Pacific, which countries are the source of the greatest and growing client demand, and why? • Scanning the globe, where are the most interesting or compelling opportunities today, and why? • How does the wealth management industry work with the investment migration industry, and what are the commercial or other advantages of doing so? Chair Michael Stanhope Founder & Chief Executive Officer Hubbis Speaker Nirbhay Handa

Group Head of Business Development
Henley & Partners

Edmund Leow
Senior Partner, Senior Counsel
Dentons Rodyk & Davidson

Hrishikesh Unni
Managing Director, Client Investments Head of Best Practices Program
Taurus Wealth Advisors

11.00am	Refreshment & Networking

11.30am Presentation
Evolution of the Single-Family Office

Zac Lucas
Partner – International Private Wealth
Spencer West LLP

- Market demand for Family Office Solutions
- Structuring Family Offices
- Dispute Management

11.45am Panel Discussion

Trends and developments in Wealth Structuring

- What are the multi jurisdiction solutions you can use today?
- How do you blend the right structures for your clients?
- What is the evolution of private client structures?
- What are the differences between structuring for the first generation and the next gen?
- What are the expectations of the next generation?

Chair

Zac Lucas
Partner – International Private Wealth
Spencer West LLP

Speaker

Gerard Gardner
Global Head Wealth Solutions
EFG Wealth Solutions

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

Kevin Lee
Partner
Stephenson Harwood

12.15pm Presentation
The Effectiveness of Information Exchange

John Shoemaker
Registered Foreign Lawyer
Butler Snow

- The recent U.S. Treasury internal audit report that addresses the effectiveness of the FATCA regime
- Current legislation under review which would effectively bring the U.S. into CRS equivalence
- The next steps all clients should take to prepare for potential large-scale changes to the global information exchange regime

12.30pm Panel Discussion

The Rich and Tax – the pressure is growing around the world

- What is the likelihood of the wealthier being the key targets for the higher tax revenues in the foreseeable future, and why?
- Will we likely see estate/wealth taxes in any of the leading economies, such as China, Hong Kong, Singapore, Indonesia and others?
- Will inheritance tax emerge or return across Asia? Why? Where?
- Are we likely to see new tax amnesties aimed at inducing wealth repatriation in the region, for example, in China?
- What does all this mean for wealth, estate and legacy planning & structuring for Asia's private clients?
- Who do they turn to for advice and solutions?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

John Shoemaker
Registered Foreign Lawyer
Butler Snow

Bijal Ajinkya
Partner
Khaitan & Co

Zac Lucas
Partner – International Private Wealth
Spencer West LLP

1.00pm Lunch & Networking

2.00pm Forum Ends