Asian Wealth Solutions Forum 2018

8.55am

Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.00am

Panel Discussion

Asian Families legacy and succession planning – what trends are we seeing?

- What are the practical considerations today for HNW clients in wealth protection?
- Do they even know what they own? How do they organise this?
- How are these needs developing? And how can you help clients understand these needs?
- Do we need to simplify the conversation with clients and go back to basics?
- What does the word 'advice' mean today – and who is licenced and capable of providing it?
- Are banks providing the services clients want – or just providing them the services they have to sell?
- Do clients understand what's critical and what's not?
- How are you upgrading your platform and services to make the most of this opportunity?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Woon Shiu Lee
Managing Director, Head of Wealth Planning (Trust and Insurance)
Bank of Singapore

Rohit Bhuta

Gerard Gardner
Global Head Wealth Solutions
EFG Wealth Solutions

Simon Lints
Chief Executive Officer, Singapore
Schroders Wealth Management

9.45am

Head - to - Head Q & A

Recent Trends and Developments in Investor Migration

Nirbhay Handa
Group Head of Business Development
Henley & Partners

- Global trends and developments in investor migration

- What’s driving investor migration for Asian HNWIs?
- Key considerations for HNWIs in relation to residence and citizenship planning

9.55am

Presentation
Revisiting Family Governance

Marcus Hinkley
Head Of Client Services
Hawksford

Will your family destroy your wealth, or will your wealth destroy your family?

Family dynamics should always be considered by Wealth advisers when structuring a wealth succession plan. In this presentation Marcus Hinkley will consider relevant family issues surrounding the succession of wealth, be it family governance, what’s in a family constitution, the impact of divorce, second marriages, balancing the expectations of children or the effects on family wealth of living longer.

10.05am

Head - to - Head Q & A

Physical Gold – making a shiny and solid contribution to any portfolio

Nicolas Mathier
CEO
Global Precious Metals

- Why should you buy physical Gold?
- How should you buy it? Or not buy it?
- Where should you store it?

10.15am

Panel Discussion

Helping wealthy individuals and families protect themselves

- What trends and innovation are we seeing in the HNW insurance space?
- What are the opportunities and challenges?
- What's the role of insurance in tax optimisation and legacy planning?
- How can you better understand the insurance needs of HNW clients?
- Can you follow a simple process to increase sales?
- How can you discover the right opportunities and have a needs-based conversation with clients?
- How can you increase the likelihood of success after introducing a client to a broker?
- What's your role? What's the brokers role?
- What does the opportunity in helping wealthy individuals and family’s insurance meet their protection needs mean to you?
- Is UL - and the associated premium financing - now much less relevant? Whats replaces this?
- What do you think about whole of life policies as a HNW solution?

Chair

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	Speaker
	Richard Vargo Managing Director, Bancassurance, Consumer Investment & Insurance Products DBS Bank
	Rohit Ganguli Head of Wealth Planning Asia EFG International
	James Tan Chief Executive Officer Tokio Marine Life Insurance
	Walter de Oude Founder Director Aviva Singlife
	Ian Kloss Head of Region, Southeast Asia & CEO Singapore Quilter International
	Craig Ellis Global Head of Products Charles Monat Associates
11.00am	Presentation Where Next? Tax implications of residence planning for HNW families
	Pierre Vanrenterghem Manager, South East Asia Rosemont
	• Overview of selected tax regimes in Europe • Implications of family relocation on their income tax, wealth tax, inheritance tax, etc. • Potential structuring solutions
11.10am	Refreshment & Networking
11.35am	Presentation Single Family Office – let's keep it simple
	Sebastien Hayoz Managing Director Asiaciti Trust
	• Corporate Governance vs Human Being • Key reasons to start a family office • Is it for the ultra-rich only?
11.45am	Presentation A new look at Universal Life - Guaranteed returns and Liquidity in a volatile world
	David Varley

Chief Partnership Officer - Brokerage, International HuBS
Sun Life

- Using Insurance as an Asset to reduce risk to your portfolio
- Take advantage of the Wealth Structuring benefits of HNW Insurance
- Learn about how High and Low Life cover Universal Life solutions to give you guaranteed returns and liquidity

11.55am

Head - to - Head Q & A

Changes in the Industry

Peter Triggs
Managing Director and Head of International Clients and Wealth Structuring
DBS Bank

- What are the biggest challenges facing Asian families today?
- What about the future. Do Wealth Planners today need to change their act?
- You have worked in Europe, the Middle East and in Asia. Are there big differences in client concerns and the way advisers need to work?
- What have been the biggest changes you have seen in wealth planning over the last 30 years?

12.05pm

Presentation
Wealth Preservation & Wealth Transfer – Knowns & Unknowns

David Denton
Head of International Technical Sales
Quilter International

- Are HNW clients' wealth needs fulfilled by the insurance products in the market place?
- What opportunities remain overlooked or not yet fully-realised?
- How to better manage multi-jurisdictional assets with respect to wealth preservation?
- How can HNW clients achieve wealth transfer despite the regulatory and tax complexities in today's world?

12.15pm

Presentation
Avoiding common Multigenerational Wealth Planning Pitfalls

Mark Nelligan
Chief Executive Officer
Pershing Singapore, a BNY Mellon company

- Looting the legacy
- Monarch to mentor
- Transactional traps
- Death and Divorce

12.25pm

Panel Discussion

The family business and wealth - transitioning across generations

- How can RMs have a proactive, sensible and sensitive conversation with families about succession and business issues?
- What do UHNW families in Asia need – and how is this changing?
- What's your role in all of this? How can you help set the family agenda – and keep the family together?
- How can you avoid family disputes?
- What are the issues and how do they get resolved?
- How to fight and when to fight?
- How do you make relationships sticky across generations? What are the touch points you must have?
- How are the demands of the next generation different?
- What motivates them when it comes to topics like ESG and Phiolanthropy?
- What governance structure can you put in place to minimise tensions and enhance longevity of the structure?
- What shared values should drive family behaviour?

Chair

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Founder & Chief Executive Officer
Hubbis

Speaker

Kimmis Pun
Managing Director, Head of Private Banking, Singapore
VP Bank

Michael Troth
Head of Trust and Wealth Planning and Family Office - Asia
Citi Private Bank

Tuck Meng Yee
Partner and Founder
JRT Partners

Prof Gunter Dufey
Professor Emeritus of Corporate Strategy, International Business and Finance
PIBA SA

Jen Cher Chew
Senior Wealth Planner - Wealth Planning, Family Office and Insurance Solutions
DBS Bank

Michele Ferrario
Co-Founder & Chief Executive Officer
StashAway

1.00pm Presentation
Investment solutions from Asia's robo-platform providers

Shadab Taiyabi
Senior Executive, Strategic Partnerships
Quantifeed

- Theme-based Investing: thematic portfolios accessing big ideas
- Risk-based Investing: sensible investing delivered simply
- Goal-based Investing: engaging with customers for the long haul

1.10pm Lunch & Networking

1.50pm Room B – Workshop

Solutions on Wealth Preservation & Wealth Transfer For HNWs

This is a workshop to share the HNW clients' needs and concerns on wealth preservation and inter-generational wealth transfer. At the workshop, we will discuss how a private placement life insurance (PPLI) and variable universal life (VUL) help solve the concerns of the HNWs. You should attend:

- If any of your clients own wealth internationally such as holding UK and US assets directly
- If any of your clients own London residential property
- If any of your clients are planning to move to Australia
- If you are looking for a solution to simplify CRS
- If any of your clients are very concerned about confidentiality when planning for succession

David Denton
Head of International Technical Sales
Quilter International

Ian Kloss
Head of Region, Southeast Asia & CEO Singapore
Quilter International

1.50pm Room B – Workshop

UK private tax client issues

- What are the Challenges arising from the UK Criminal Finances Act 2017?
- What does the new 'Corporate Offences of Tax Evasion' legislation mean for you?
- The Statutory Defense of 'Reasonable Procedures'
- Unexplained Wealth Orders
- Are your structures / planning underpinned by the correct tax advice?
- Investing in UK property residential property: traps, pitfalls and planning tips

Laurence Lancaster
Barrister-at-law, Group Head of Tax
The Sovereign Group

Gez Owen
General Counsel and Head of Content
Hubbis

2.30pm Room A – Workshop

The World's Leading Residence - and Citizenship-by-Investment Programs

- Overview of Immigration programmes
- The leading Citizenship-by-Investment Programs in the Caribbean
- European Citizenship-by-Investment in Malta and Cyprus
- Attractive European Residence-by-Investment Program

Alexis Tan
Senior Manager, Vietnam
Henley & Partners

Daphne Chandra, IMCM
Country Head, Indonesia
Henley & Partners

2.30pm Room B – Workshop

The EU has now adopted CRS Mandatory Disclosures Rules (MDRs) – what does this mean for you?

- How will MDRs affect professional wealth management advice?
- MDRs are intended to be retroactive to 2014, what do you do if you have been involved in avoidance arrangements in the last few years?
- How will the MDRs affect residence planning advice?
- How does the MDRs impact advice given by lawyers?
- How will the MDRs be enforced, can a MDR disclosure be used to prosecute the disclosing professional?

Zac Lucas
Founder, Head of Legal
Centenal

3.10pm Refreshment & Networking

3.30pm Panel Discussion

The new transparent world in which we live

- How do you get tax planning right? Does everyone know today how to comply with the law?
- How can we avoid duplicate reporting?
- What are the dangers of inaccurate data reporting and how to achieve more accurate reporting?
- Do Individuals have a right to see their own FATCA/CRS data? If so, will this create disclosure complications for the Trustee?
- What are the distinctions between Protectors, Enforcers, Consentors, Successors, Substitutes, etc. from a transparency perspective?
- What will be the role of the U.S. in the new transparent finance world?
- What are the structures that are used? What structures will be most relevant and effective in the future?
- People need to be very careful of publicity – PR and Social Media is an issue. How can they deal with that?New TAX developments in China and elsewhere?
- The EU has now adopted CRS Mandatory Disclosures Rules (MDRs) How will this affect professional wealth management advice?
- How will the MDRs affect residence planning advice?
- Are the existing 'structures' you have in place today for your clients still relevant? How do you keep clients up-to-date?
- Must clients put their money in the most reputable place so people know they are clean?
- What motivates a client today to have a 'structure' in an international financial centre?
- Why do you use one international financial center vs another?
- How does residency and citizenship planning help?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

John Shoemaker
Registered Foreign Lawyer

Butler Snow

Marcus Hinkley
Head Of Client Services
Hawksford

Malcolm K-L Lim
Director
Sovereign Straits Trust

Zac Lucas
Founder, Head of Legal
Centenal

Mark Smallwood
CEO, Rapier Consulting. And Engagement & Consultant Partner,
Hubbis

4.15pm Panel Discussion

Will Singapore continue to be a very important financial centre?

- How is Singapore positioning itself in comparison to other financial centres?
- Is it becoming more important - in comparison to other centres - as clients become better informed
- What are you currently seeing in the private client world in Singapore?
- What are the key tax issues you are advising clients on today in Singapore?
- How will the tax system in Singapore change?
- Will reducing or removing tax exemptions dramatically change the value proposition that Singapore represents?
- Will the foreign trust tax exemptions be scrapped?
- What changes will we see from Singapore to make it even more appealing?

Chair

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Founder & Chief Executive Officer
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Speaker

Kylie Luo
Executive Director, Tax, Private Client Tax Services Leader
BDO

Dawn Quek
Principal in Tax and Wealth Management Practice
Baker McKenzie

Edmund Leow
Senior Partner, Senior Counsel
Dentons Rodyk & Davidson

Vikna Rajah
Executive Committee Partner (Head Tax, Trust & Private Wealth)
Rajah & Tann

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

5.00pm Forum Ends