EFG Succession Planning Forum 2020

4.30pm

Welcome Address

Richard Straus
Senior Managing Director, Head of Private Banking - Hong Kong
EFG International

Oliver Balmelli
Head of Independent Asset Managers and International Private Banking
EFG International

4.35pm

Presentation
Wealth planning overview

Alfonso Rivolta
Global Head of Wealth Planning
EFG International

- The EFG Wealth Planning webinar series
- Overview of wealth planning capabilities in EFG
- The importance of insurance solutions and how we can assist clients

4.45pm

Presentation
The Need for Insurance

Max Liao
Vice President
Howden Private

Reuben Mashicharan
Head of International, Singapore
Howden Private

Peter Tsih
Group Chief Executive Officer
Howden Private

- Overview on the importance of insurance
- Developments due to COVID 19
- Whole of Life insurance solutions (i.e ULI, WOL policies with high cover)

5.05pm

Presentation
Life Insurance - state of the art succession planning tool

Marc-Andre Sola
Founder & Chairman
1291 Group

- Overview of the life insurance market

- What is PPLI/VUL
- How PPLI and VUL can be used effectively to deal with succession planning concerns
- PPLI/VUL in combination with trust – a powerful combination

5.25pm	Q&A
5.40pm	Closing remarks Rohit Ganguli Head of Wealth Planning Asia EFG International
5.45pm	Forum Ends