Family Office Forum 2023

8.30am	Registration
8.50am	Welcome Address Satyen Patel Executive Chairman Eton Solutions
9.00am	Presentation Key Family Office Trends across Asia: Challenges and perspectives across the eco-system Dr. Silvio Struebi Partner Simon-Kucher Global Strategy Consultancy • Key findings from the Asia family office market survey • Motivations and needs of the family office beneficial owners • Pain points in setting up and running a family office • Success factors for service providers in servicing family offices. What are the value drivers that family offices are most focused on?
9.20am	Panel Discussion Setting up a family office - What are the actual challenges and consequences of having a family office? • Why do you need a family office? What are key considerations? • What are the tax issues? • What is the division between a family office and an investment office? • What are the different types of trust / structures and how are they relevant? • How do you manage all the ‘governance’ aspects specifically? • How can you keep abreast of all the legal and procedural requirements? • What typically goes wrong? • Differences between the needs and expectations for clients from PRC, SE Asia, India or elsewhere? • What are the specific challenges with family offices adapting to today’s complexities? Chair Kevin Hayes President Eton Solutions Speaker Woon Hum Tan Partner, Head of Trust, Asset & Wealth Management Practice Shook Lin & Bok Roxanne Davies CEO Proprietary Capital Holdings

	Dr. Silvio Struebi Partner Simon-Kucher Global Strategy Consultancy John Shoemaker Registered Foreign Lawyer Butler Snow Carolyn Leng Managing Director Bordier & Cie
10.00am	Presentation Transforming a Family Office to Reimagine the Value it Delivers: Lessons learned by a Family Office Founder Robert Mallernee Co-founder and CEO Eton Solutions • Setting up a family office to deliver scalable advantage for tomorrow • Using technology to create operational leverage and efficiencies • Digitalising governance functions within the Family Office and across family members and key advisors
10.20am	Presentation Family Office CRS Reporting Zac Lucas Partner – International Private Wealth Spencer West LLP • Overview (Fund Management / Fund Company) • Family Office Structure, Common Reporting Errors • Family Office Trust, Common Reporting Errors • Family Offices and CRS Anti-Avoidance Rules • IRAS Family Office Audit Requirements • OECD Changes to CRS, Family Office Implications
10.40am	Presentation Regulatory developments and operational implications for Singapore family offices Spencer Hsu Associate Partner, Private Tax Services EY • On 18 April 2022, the Monetary Authority of Singapore announced a series of changes to qualifying criteria for the Section 13 inventive schemes for single family offices. The changes were targeted at raising the level of professionalism and quality of family offices in Singapore. • Arising from the changes, there has been a departure in approach to how the Section 13 incentives are being administered. In this session, we take a deep dive into these changes and understand the consequential implications on complying with the revised qualifying criteria for the incentive scheme.

11.00am Refreshment & Networking

11.30am Presentation

Cost effective Reporting, Operations and Governance for Start Up Family Offices

Satyen Patel
Executive Chairman
Eton Solutions

Bryan Henning
SVP, Head of International
Eton Solutions

- Outline of market first offering democratising technology and services used by billionaire family offices cost effectively to meet all needs of smaller or newly starting up Family Offices
- Outline of how proposition meets challenges with respect to showing total wealth view integrating financial and non-financial assets
- Use of mobile application capabilities for key decision makers to easily access key information, store and retrieve documentation and make payments through direct connectivity to their banks
- Creating enhanced controls and governance while also creating operational leverage by moving from manual spreadsheet/sharepoint environment to fully digital solution with embedded delegated approvals and audit trails

12.00pm Panel Discussion

Running a Family Office Efficiently

- What are the key elements to consider in set up?
- Where to start and what should you consider as you operationalise your Family Office?
- What do you outsource and what do you do yourself?
- How can you best grow and scale the Family Office?
- What are the typical challenges you face?
- How do you find the right partners to make this a success?

Chair

Bryan Henning
SVP, Head of International
Eton Solutions

Speaker

Bryan Goh
Chief Executive Officer, Chief Investment Officer
Tsao Family Office

Spencer Hsu
Associate Partner, Private Tax Services
EY

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

	Andrew Hull Chief Executive Todd Family Office Lucia Luchetti Head of Trusts Services Equiom Group
1.00pm	Lunch & Networking
2.00pm	Workshop Setting up a Family Office and Creating Governance through Digitalization Robert Mallernee Co-founder and CEO Eton Solutions • Lessons learned in setting up family offices big and small • How to deal with key pain points • Working with families and advisors to effectively use digitalization to implement family governance
2.40pm	Workshop Administrative Family Office Proposition Dr. Silvio Struebi Partner Simon-Kucher Global Strategy Consultancy Bryan Henning SVP, Head of International Eton Solutions Nimish Soni Chief Operating Officer Eton Solutions • Discussion on a full-service proposition for new and smaller Family Offices looking to set up cost efficiently • Elaboration on a tiered service offering including incorporation of bank feeds and non-financial assets to provide holistic wealth views, investment reporting and handling of complex transactions like capital calls for Private Equity • Demonstration of platform, reporting capabilities and mobile application
3.20pm	Refreshment & Networking
3.40pm	Workshop Family Office vs. Investment Office Trusts Zac Lucas Partner – International Private Wealth Spencer West LLP

- Family Office Market Segments (North Asia / Southeast Asia)
- Key Features - Investment Office Trust
- Key Drafting Errors - Investment Office Trust
- Key Features - Family Office Trust
- Key Drafting Errors - Family Office Trust
- Family Office Services, Best Practice Guidance

4.20pm Workshop

Managing Technology Challenges for Family Offices: Vendor selection, Implementation, and Cybersecurity considerations

Han Wee Tan
Partner, Wealth & Asset Management Consulting
EY

Murali Nadarajah
Chief Information Officer
Eton Solutions

- Vendor selection considerations – integrated solutions vs multiple applications, short-term and long-term considerations
- Planning for a successful implementation
- Cloud hosted solutions – cybersecurity considerations and other potential issues

5.00pm Forum Ends