HNW INSURANCE SUMMIT - Dubai 2023

8.30am Registration

8.55am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.00am Panel Discussion

Creating value for clients as they consider their legacy

- What is the current state of the UAE private wealth management market, and what are the key advantages it offers regional and global clients?
- What are some of the regulatory and proposition updates to consider?
- What do UHNW clients expect of their advisers and the professional services firms they work with?
- What are the consequences of setting up a Family office in the UAE? What are the issues to be aware of? What are the other options in the MIddle East? How will these develop?
- What are the challenges? What else needs to be improved to make this an effective and sustainable proposition?
- What are the other trends we are seeing and expectations for 2023?
- Where are these UHNW Families coming from? What are the typical differences between a family from different geographies and their expectations?
- How is HNW Life Insurance developing in the UAE?

Chair

Marc-Andre Sola
Founder & Chairman
1291 Group

Speaker

Sunita Singh-Dalal
Partner, Private Wealth & Family Offices
Hourani & Partners

Ismael Hajjar
Partner, Entrepreneurial Private, Business, Family Office Services - Middle East
PwC

Alastair Glover
Partner - Private Wealth
Trowers & Hamlins

9.30am Presentation
What are the HNW Life Insurance Options?

Marc-Andre Sola
Founder & Chairman
1291 Group

- How do you choose? - Whole Life, Term Life, UL, VUL, IUL and PPLI.

- More product choice is confusing – how can we present the right opportunities to clients today?
- How important is the relationship between HNW Insurance and Tax planning?
- What Trends are you seeing within Life Insurance?
- What differences are you seeing between the needs of European clients' and Clients in the middle East?

10.00am

Presentation
Wealth & Succession Planning in an Increasingly Uncertain World

Jeremy Young
Chief Commercial Officer
Transamerica Life (Bermuda)

- Will the actual outcome equal the planned outcome? Have you considered all the variables when you choose the right insurance solution?
- What happens as the family changes and evolves? Is the original insurance policy still relevant? What do you do now?
- Where does succession planning governance fit into the review process? And who has this responsibility? Who are the key stakeholders in this discussion?

10.30am

Panel Discussion

Wealth Solutions and Insurance – navigating your way through a complicated maze

- What trends do you see in the HNW Insurance market?
- How does increased interest rates impact product choice?
- How does Citizenship and Residency affect the conversation and options?
- Is Life Insurance compatible with Sharia law?
- How to start the wealth solutions / HNW Insurance discussion and why is this increasingly important?
- How can this be a win for you and your clients?
- Suitability / tax / transparency – what are all the challenges we must consider?
- In a more competitive environment – how do we differentiate ourselves?
- How does insurance and a family office potentially blend together?
- How should you use trust structures when considering insurance solutions?

Chair

Sunita Singh-Dalal
Partner, Private Wealth & Family Offices
Hourani & Partners

Speaker

Philippe Amarante
Managing Partner, Head of Dubai and Pakistan
Henley & Partners

Nirav Dinesh Kumar Shah
Founder and Managing Director
FAME Advisory DMCC

Marc-Andre Sola
Founder & Chairman
1291 Group

Reggie Mezu
Special Counsel
Baker McKenzie

11.00am Refreshment & Networking

11.30am Presentation
How to serve UHNW clients via PPLI

Louis D. Zuckerbraun
Managing Director
Geneva International Insurance

- PPLI and its mechanics
- Market and legal considerations
- Geneva International advantages

12.00pm Panel Discussion

How can you present HNW Insurance to help meet client needs?

- One of the issues with Life Insurance is that everyone (providers and brokers) focus on products – apart from the client, who thinks about their actual needs. To what extent must this change?
- What are the actual needs of clients, and why do they need wealth solutions and HNW Insurance anyhow?
- Is there a need for liquidity in succession planning? Do clients have cash available for issues like inheritance tax? Mortgages? Loans? Etc.
- How does HNW Insurance need to be structured as part of a holistic wealth and legacy planning strategy?
- How important is after sales service in Life Insurance? How are policies monitored in the long term?

Chair

Jeremy Young
Chief Commercial Officer
Transamerica Life (Bermuda)

Speaker

Simon Price
CEO
DIFC Insurance Association

Priyanka Roy Jivani
Partner
1291 Group

Tim Denton
Executive Vice President, Head of Wealth Structuring
Habib Bank AG Zurich

12.30pm Presentation
Introduction to Knighthead Annuity

Robert Chan

Vice President, Business Development
Knighthead Annuity & Life Assurance Company

John Harrell
Executive Vice President, Head of Sales
Knighthead Annuity & Life Assurance Company

- Why Annuities?
- Benefits of a Cayman Islands based Annuity with US Asset Manager
- Predictable Fixed Income

1.00pm	Lunch & Networking
2.00pm	Forum Ends