HUBBIS WEALTH SOLUTIONS FORUM - Dubai 2022

8.30am Registration

8.55am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.00am Panel Discussion - in partnership with Saxo Bank

How is the UAE positioning itself as a wealth management centre?

- What is the current state of the UAE wealth management market, and what are the key advantages it offers regional and global clients?
- Can UAE compete effectively with Singapore / Switzerland as a go-to centre for single-family offices and UHNW clients? And if so, how?
- How is the opportunity developing for regional wealth managers? How about firms from Asia and globally?
- Are there any issues to further growth? Talent / cost / bandwidth?

Chair

Damian Hitchen
Chief Executive Officer, MENA
Saxo

Speaker

Alastair Glover
Partner - Private Wealth
Trowers & Hamlins

Asghar Abid
Executive Director, Head of Wealth Planning - DIFC Dubai
Bank of Singapore

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

9.30am Presentation
How can a Wealth Protection Plan help you navigate the many challenges today?

Marc-Andre Sola
Founder & Chairman
1291 Group

In today's world UHNW families are exposed to many challenges that potentially destroy their wealth - global fiscal controls, international transparency, cross boarder regulations and political uncertainty – to name a few. As Professionals we face overwhelming legal and reputational risks, How can a solid Wealth Protection Plan help overcome these issues?

- What does Wealth Protection Planning mean?

- How does a great Wealth Protection Plan help clients and Professionals!
- What solutions are available and how are they different?
- What are the highlights of the most complete Wealth Protection Plan?

9.50am

Presentation
Expatriate Tax Planning - Mitigating Re-Entry Shock

Brendan Harper
Head of Asia and UHNW Technical Services
Utmost Wealth Solutions

A major attraction to life in the UAE is the ability to live tax-free. As a result of this, many expatriates overlook tax planning in the belief that it is not relevant to them. However, ignoring tax planning sets the expatriate up for "re-entry shock" should they retire back home without considering the tax aspect. Using key expatriate market segments (UK, India, South Africa and Australia), this session will focus on tax planning for expatriates or those thinking of retiring in these jurisdictions. The session will address:

- An overview of the tax systems in core expatriate jurisdictions
- How it applies to investments, pensions and wealth planning
- Where does Private Placement Life Insurance structuring fit in and why is it popular with expatriates?
- How does PPLI complement trust and estate planning?

10.10am

Presentation
UAE continues to attract private wealth clients and advisers

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

- Latest insights across the spectrum
- The Equilibrium of lifestyle and investment – a case study
- The fight for financial capital continues to rise in the region

10.30am

Panel Discussion - in partnership with Henley & Partners

Working and Living in the UAE

- Ease of residency and doing business coupled with world class education, healthcare and housing enables individuals to secure a lifestyle that makes the UAE an attractive place to reside. Who is arriving and why?
- How did covid change clients thinking around mobility and living choices? How did UAE benefit and embrace this opportunity?
- What are different visa options that clients have? Do clients get confused? Which is best? And how attractive have remote working visas been?
- How attractive has it become for specific sectors like Family Offices or Digital Assets?

Chair

Dominic Volek
Group Head of Private Clients and Member of the Executive Committee
Henley & Partners

Speaker

Hans Diederen
Executive Advisor (Asia)
Apollo Crypto

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

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

11.00am Refreshment & Networking

11.30am Panel Discussion - in partnership with 1291 Group

Wealth Structuring Trends

- How is the role of estate and legacy planning changing today?
- What are the moving parts – and how do you co-ordinate the best solution for clients?
- What are the pitfalls and consequences of not doing it properly?
- What do UHNW clients expect of their advisers and the professional services firms they work with?
- What are the multi jurisdiction solutions you can use today?
- What are the differences between structuring for the first generation and the next gen?
- What's the role of HNW Insurance in legacy planning and tax optimisation?
- How is proposed Corporate tax and increased compliance likely impact the UAE as jurisdiction?

Chair

Marc-Andre Sola
Founder & Chairman
1291 Group

Speaker

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

Nirav Dinesh Kumar Shah
Founder and Managing Director
FAME Advisory DMCC

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

Bijal Ajinkya
Partner
Khaitan & Co

12.00pm Panel Discussion

Middle East and Asia – complementary or competing?

- Do you need a foot in both camps and if so why?
- Why are we seeing more interest from Asian wealth managers building a platform in

UAE?
- Singapore vs UAE - both centres have political stability, neutrality, world class infrastructure and a positive regulatory framework. So what are the pluses and minuses of each?
- How does the wealth community deliver advice and structures across multiple jurisdictions?
- Is there an opportunity to create a niche to service MENA investors out of Singapore/HK?
- Are there specific MENA investment opportunities attractive for Asian wealth managers and Asian investors?
- How do Indian clients consider their options

Chair

Irene Lee
Business Development Director
British and Malayan Trustees

Speaker

Nikolaos Koutsoukos
Chief Executive Officer - DIFC Representative Office
SingAlliance

Gary Dugan
Chief Executive Officer
DALMA CAPITAL - Global CEO Office

Vikas Jaidka
Managing Director, Region Head- Middle East, Africa and NRI
DBS Private Bank

12.30pm Presentation
DIFC Foundations – Succession planning for the next generation

Dave Lange
General Manager
Trident Trust

- Key elements of a DIFC Foundation
- Comparison to a Trust or Will
- Benefits of setting up a DIFC Foundation
- Global Wealth Structure - working example

12.45pm Panel Discussion

UHNW Business Families – exploring the options in this region

- Why are UHNW families exploring options to establish a family office in the Middle East?
- What must they consider when executing and / or structuring their wealth in this region?
- Setting up a Single – or Multi-Family Office – What are the options? In UAE and elsewhere?
- What’s the process they follow?
- Why are we seeing so much demand?
- What have the regulators/authorities been doing to widen the appeal of the UAE?

Chair

Sunita Singh-Dalal

	Partner, Private Wealth & Family Offices Hourani & Partners
	Speaker
	Arjun Mittal Founder & CIO Abbey Road Investment
	Izabella Szadkowska Partner, Corporate Structuring Al Tamimi & Company
	Shadi Alnasr Principal – Global Family Office BNY Mellon Wealth Management
	Dr. Bhaskar Dasgupta Head of Strategic Development - MENA APEX Group
1.15pm	Lunch & Networking
2.00pm	Forum Ends