Preserving Intergenerational Wealth: Effective Planning Solutions

3.00pm	Preserving Intergenerational Wealth: Effective Planning Solutions

- Broadly, what are the key trends and issues around the need for more focus on estate and legacy planning?
- What are the changing needs and expectations of HNW and UHNW families?
- Are these families adequately prepared for the transition of assets and businesses to the next generations?
- What steps have been taken (if any) to prepare the next generations for their inheritances and their responsibilities?
- What types of structures are HNW and UHNW founders, patriarchs, matriarchs, and their families adopting nowadays for their estate, succession, and legacy planning?
- Is the wealth management industry paying sufficient attention to these needs and elevating their skills and offering to cater to current and expected needs and expectations?
- What roles do family and business governance play in these plans?
- What role should or could the single-family office play in robust, forward-looking wealth & estate planning and how does that encompass the future generations?
- How closely involved should the second and third generations be in this estate and succession planning, and how can advisors and specialists help draw the founders and the younger generations together?
- What are the current trends in terms of trust structures, and is this a significant growth area in the future?
- Is the region’s fiduciary services ecosystem expanding well, and how do families choose the right trustees, and then work effectively with them?
- How can life insurance solutions work alongside effective estate and legacy planning, and what solutions are popular or increasing in prominence?
- Which jurisdictions do private clients prefer to utilise for their wealth planning, trust structures and Insurance? Why?
- Recent developments in Investment Migration • Which type of trustee is best: professional trust company or private trust company?
- Which trust laws tend to be most popular (SG, HK, Jersey, BVI) and why?

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4.00pm	Webinar Ends