

EFG HNW Insurance Summit

4.00pm

Welcome Address

Richard Straus

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

4.10pm

Presentation

Heightened demand for solutions in the pandemic

Berry Wong

Chief Executive Officer, Asia Pacific
Charles Monat Associates

Nikki Koh

Chief Executive Officer & Group Chief Commercial Officer
Charles Monat Associates

Simon Lo

International Chief Executive Officer
Charles Monat Associates

- APAC insurance trends and shift in product mix since the pandemic, insights into HNW clients' needs and opportunities with various solutions
- Jumbo case sharing and collaboration for HK plans
- Unique case sharing where CMA went above & beyond for the client

4.35pm

Presentation

Succession Planning and Exit Strategies

Harold Ng

CEO and Founder
The Financialists

- Multi-generational Wealth Transfer
- Buy-Sell Agreement
- Fair Distribution
- Paper Property

5.00pm

Presentation

Insurance as an asset holding structure

Peter Triggs

Partner
1291 Group

- A different perspective on life insurance in wealth planning
- How insurance can deliver trust benefits and supplement trust structures
- How planning certainty can be achieved in a transparent world

- How life insurance can be tailor-designed for specific client situations

5.25pm Refreshment & Networking

5.30pm Panel Discussion

Maximising the HNW discussion

- How is Covid-19 continuing to impact the market, including in terms of coverage, processes, product features?
- How can you best structure the sales process given some of these potential challenges?
- What trends are we witnessing in the market?
- Specifically with the banks role in the wealth planning process, how has COVID 19 changed or impacted these discussions?
- With regard to the US, what issues should be borne in mind when a US person is buying life cover?
- What are the ingredients for a holistic wealth planning discussion and how can that be structured for the best outcome for all parties?

Speaker

Rohit Ganguli
Head of Wealth Planning Asia
EFG International

John Shoemaker
Registered Foreign Lawyer
Butler Snow

Davin Wong
Chief Executive Officer Singapore
Private Client Services by Mercer

6.20pm Closing remarks

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

6.30pm Forum Ends