HUBBIS WEALTH SOLUTIONS FORUM 2023

8.30am	Registration
8.55am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
9.00am	Panel Discussion How can private wealth managers continue to capture growth opportunities? • What is the secret ingredient of a successful offering? • How are private wealth managers evolving to offer a wider range of solutions - like insurance, and wealth planning services? • What do UHNW clients expect of their advisers and the professional services firms they work with? How is this changing? • What are the practical considerations for HNW clients in wealth protection and transfer? Chair Lee Sleight Head of Business Development, Asia Lombard International Assurance Speaker Francis Liu Chief Executive Officer, Private Clients, Asia & Chief Executive Officer, Singapore Lombard Odier Gautam Duggal Global Head, Bancassurance, Group Wealth Management Standard Chartered Bank Anthony Chan Chief Executive Officer Isola Capital Carolyn Leng Managing Director Bordier & Cie Michael Velten Senior Partner Deloitte
9.30am	Presentation What are the HNW Life Insurance Options? Roger Chi Managing Partner 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 we seeing between the needs of European clients' and Clients in the Asia?

9.45am	Presentation Family Businesses – how to build and sustain a successful enterprise Sharon Yam Country Head, Ocorian Singapore, Head of Private Clients Ocorian • What are the AML considerations in a Family office / PTC / trust structure? • How have regulations and requirements become more complicated? • How can this be implemented efficiently and how can you avoid issues?
10.00am	Presentation How does Residency and Citizenship impact the choices for Further education? Tess Wilkinson Director of Education Services Henley & Partners • How should clients decide which schools to send their kids to? • What are the requirements and expectations to enter the best Schools and Universities? • What preparation in needed and what's the process? • How can a child graduate with a degree and a passport?
10.15am	Panel Discussion Trusts and AML Risk Management • Are trusts now overregulated from an AML perspective? • Is it nearly impossible to take on a client from Vietnam and China? • Are the rules been universally applied? Is it a level playing field? • An Industry Best Practice Paper: Managing Money Laundering And Terrorism Financing ("ml/tf") Risks Associated With Complex Trust Structures - was published last year. What are the implications? Do you agree with what is being suggested? Do we need more guidance? • How do we view 'high risk' assets in trusts? • How do we view 'digital assets' in trusts? Chair Sharon Yam Country Head, Ocorian Singapore, Head of Private Clients Ocorian Speaker

Shawn Wang
Head of Trust Service, Singapore
Ocorian

Lian Chuan Yeoh
Partner
Withers KhattarWong

Ethan Chue
Chief Executive Officer
Family Succession Advisors

Marc Anley
Partner
Deloitte

10.45am	Presentation Transforming a Family Office to Reimagine the Value it Delivers Bryan Henning SVP, Head of International 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
11.00am	Refreshment & Networking
11.30am	Presentation Wealth & Succession Planning in an Increasingly Uncertain World Lee Sleight Head of Business Development, Asia Lombard International Assurance • Mobility • Life Events • Legacy
11.45am	Panel Discussion Family Offices – keeping the dream alive • What is a family office? • Is it really about consolidated asset management – or just for used for migration? • Who actually needs a family office? • Who actually benefits from a family office? • What's the impact on Singapore as this trend continues? • Do we have the right training environment? Are we doing enough to anticipate the needs of the wealthy families moving here? Is a family charter ever enough? • Is Singapore becoming too expensive an option? • Do we have enough competent professionals to meet the demand adequately?

Chair

Scott Moore, IMCM
Managing Director
Henley & Partners

Speaker

Lee Wong
Head of Family Services, Asia
Lombard Odier

Tommy Leung
Co-Head Global Family and Institutional Wealth, APAC
UBS Global Wealth Management

Alexandra Geiger
Foreign Counsel (Registered Foreign Lawyer)
Rajah & Tann

Rohit Ganguli
Head of Wealth Planning Asia
EFG International

Bryan Henning
SVP, Head of International
Eton Solutions

12.15pm Presentation
Is the U.S. nearing a global information exchange commitment?

John Shoemaker
Registered Foreign Lawyer
Butler Snow

- U.S. tax & regulatory updates
- How is the U.S. collecting data for beneficial ownership?
- Will the US now be sharing data with key partner jurisdiction?

12.30pm Panel Discussion

Trust Litigation

- Is Singapore an asset protection jurisdiction in light of the La Dolce Vita Fine Dining case?
- What do we do about clients that are trying to evade creditors?
- What's the best practices going forward to avoid this in the future? What are the key take aways from the La Dolce Vita Fine Dining case?
- What are the litigation consequences of structing assets when there is a creditor claim?
- How can you protect the Trustee?
- What are the litigation trends we are seeing today?
- How can you "stress test" wealth holding structures?
- What can go wrong with structures and how to fix this?

Chair

John Shoemaker

Registered Foreign Lawyer
Butler Snow

Speaker

Edmund Leow
Senior Partner, Senior Counsel
Dentons Rodyk & Davidson

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

Marcus Parker
Partner
Stewarts Law

Wen Ni Aw
Partner
Wong Partnership

1.00pm Lunch & Networking

2.00pm Workshop

The challenges of continuing the family legacy

Feisal Alibhai
Founder & Integrative Head
Qineticare

- Which life stage are you in?
- Step 1 - Family Harmony Assessments for each of the 2nd generation
- Step 2 - Individual tailored pathways for each of the 2nd generation
- Step 3 - Retreats for siblings, and assessments & pathways for spouses

2.45pm Workshop

Millionaire Migration – Release of the Henley Wealth Migration Index 2023

Scott Moore, IMCM
Managing Director
Henley & Partners

- Where did millionaires move to in 2022 and where are they projected to go in 2023
- Why have the millionaire migration ranking changed so much post covid
- Domicile diversification – a new asset class for the wealthy

3.30pm Refreshment & Networking

4.00pm Panel Discussion

Helping UHNW clients transfer true wealth

- Does big money equal big problems? What's your view?
- What are the key ingredients of successful succession planning?

- Why should any private wealth adviser care about this discussion?
- Mind the Gap: Imposition and Expectations
- Importance of family wellbeing in transition planning for rising generation
- The Missing Piece in Holistic Continuity Audit: Integrative Family Dynamics

Chair

Feisal Alibhai
Founder & Integrative Head
Qineticare

Speaker

David Chong
Founder & President
Portcullis Group

Carolyn Leng
Managing Director
Bordier & Cie

Anthony Chan
Chief Executive Officer
Isola Capital

Kimmis Pun
Managing Director, Family Office
Shenning Investments

5.00pm Forum Ends