

PPLI – the new dynamic planning tool for Asian private clients

4.30pm

Background to PPLI in Asia.

PPLI advantages: Legitimate tax optimisation.

Examples:

- US planning and Foreign Grantor Trust planning
- Australia Planning
- UK planning

PPLI advantages: Civil Law recognition and CFC planning.

Examples:

- Indonesia
- Taiwan
- Thailand
- China

PPLI advantages: A smarter way to obtain life cover.

Examples:

- Malaysia onshore assets
- Pay-as-you-go cost of insurance

PPLI and Trusts: Generational planning and estate equalisation.

Introduction to 1291 Group.

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1291 Group

5.00pm

Panel Discussion

PPLI and current planning opportunities in Asia.

- How well is PPLI understood today?

- Can we expect countries to start changing their tax laws?
- Are trusts being threatened by CRS and lack of recognition in civil law countries?
- Is legitimate tax optimisation becoming more important in wealth planning?
- Are the insurance carriers sufficiently sophisticated?
- Would trustees see PPLI as a threat or an enhancement to their offering?
- Would asset managers see an advantage in offering their clients a legitimate tax shelter for their investment portfolios?
- Is the use of a trust as a policy “beneficiary” rather than a “policy holder” preferable and if so, why?

Speaker

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Webinar Ends