

ESTATE PLANNING AND WEALTH SUCCESSION ASIA FORUM 2020

26-27 October 2020 (Mon & Tue)
SOFITEL SINGAPORE CITY CENTRE

Asian Intergeneration Wealth

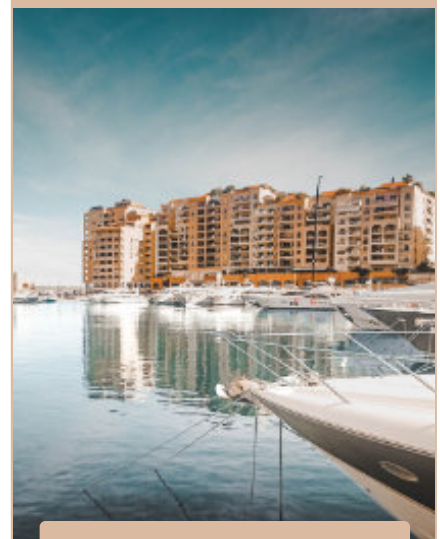
Combating “Clogs To Clogs
In 3 Generations” And
“Doing Good Wisely”



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About

This two-day Estate Planning and Wealth Succession Asia Forum 2020 is for a professional audience and centers around issues faced by modern Asian families grappling with the multi-faceted aspects of legacy and succession planning. With billions of wealth assets expected to be transferred to the next generation in the next few decades, hear from our esteemed keynote speakers and engage with industry veterans and international estate planning gurus who will share the latest trends, developments and solutions that clients need to embrace. The forum also focuses on second-generation wealth succession, family offices, private trust companies, cross-border assets planning, dealing with inheritable wealth taxes, tax residences, mental incapacity and special needs planning, philanthropy and many more topics.

Join us at this milestone event for professionals in the fields of Asian Family Business Planning, Wealth Succession and Estate Planning. Meet like-minded professionals from Family Offices, Banks, Real Estate companies, Legal firms as well as Fund Managers, Estate Planners, Accountants and Financial Advisors.

Featuring

- : More than 15 topics and panel discussions
- : Includes discussions on country-specific issue (s)
- : A global panel of over 40 esteemed speakers
- : Keynote speakers **Ms. Claire Chiang** (Co-Founder, Banyan Tree) and **Mr. Toh Soon Huat** (Executive Chairman, Novena Foundation Pte Ltd; Executive Chairman of Sian Chay Medical Institutional); (Named one of Forbes Asia 2019 Heroes of Philanthropy)

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Geographic Context for Panel Discussions:

Singapore	Taiwan	New Zealand
China	Indonesia	United States
Hong Kong	Middle East	United Kingdom

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CEO Message



Mr Lee Chiwi
CEO, PreceptsGroup International

We extend a warm welcome to you! Against the backdrop of Covid-19 and its effect on the economic and business landscape, we see that it is even more timely to bring together a panel of well-respected industry veterans to discuss issues faced by modern Asian families with regards to legacy and succession planning.

We are now at the crossroads of significant wealth transitioning as the founder, patriarch or matriarch are looking to efficiently groom the next generation to not only sustain their successes but to continue their legacy. As many intangible aspects such as family dynamics and governance come into play, the advisor role has become all the more important in addressing the unique challenges and balancing interests between generations.

History proves that crises will pass and, in the meantime, catalyses new ideas, behaviours and opportunities. We see growth opportunities in certain markets in tandem with the behavioural shifts and interest in Asia. In the same vein, tax regimes and advancements in the financial sector also shape the way financial advisory services is

being handled especially at a time when the rise of Fintech is disrupting the traditional ways of doing things.

With family harmony being at the heart of our business, intergenerational wealth management should be looked into cautiously with proper planning, taking into consideration multi-jurisdiction assets and beneficiaries who are sometimes 'global citizens'. There could be practical solutions to mitigate the risks of family disputes or even thoughtful giving back to the society, leaving a legacy through philanthropy.

There is a great unease and anxiety for everyone, worldwide. But this is also now the time when the knowledgeable trusted advisor can step up and make a difference in helping their clients plan for their wealth succession.

We look forward to your participation and hope that you will benefit from the insights discussed at this Estate Planning and Wealth Succession Asia Forum 2020.

Asian Intergeneration Wealth

Combating “Clogs to Clogs In 3 Generations” and “DOING GOOD WISELY”

Topic: Asian Family Business Succession

Synopsis: Asia's 20 richest families control at least \$450 Billion. Asia is the region that now holds one-third of global wealth.

In Asia, the business boom started in the 80s. Hence, succession planning is now suddenly a hot topic as family-owned companies are now faced with first-wave succession challenges.

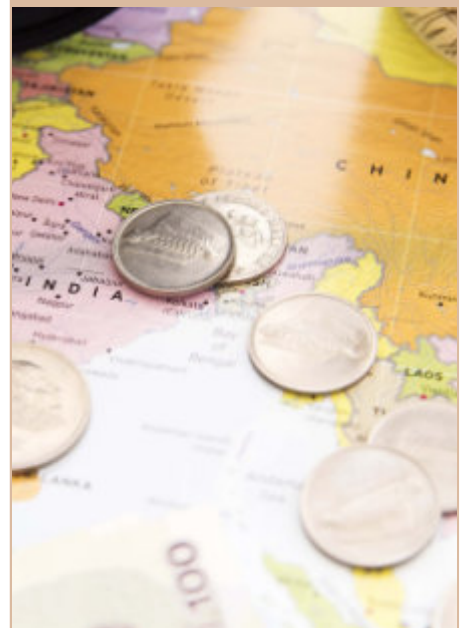
The Asian Venture Philanthropy Network expects 35% of the region's wealth set to shift to next-generation over the coming 5-7 years.

According to a report by RBC Wealth Management, their research into wealth transfer found that many families are unprepared to pass their legacy and knowledge to the next generation. Just 26% have a full wealth transfer plan in place and the findings highlighted that the next generation is not being educated early enough about the management of wealth.

In what circumstances do they continue with the business or should they plan for an exit strategy? How should wealth advisers be involved to deal with such aspects and concerns of their clients?

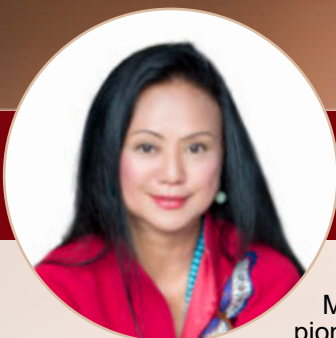
It is now an opportune time to address issues surrounding the Asian Family Business Succession and its business succession plan.

Source: Forbes Media



KEYNOTE SPEAKERS

DAY 1

**Ms. Claire Chiang**

Co-founder
Banyan Tree

Ms. Chiang is a Co-founder of Banyan Tree Hotels & Resorts and pioneer the Group's retail business. As Chairperson for China Business Development, she focuses on acquiring new management contracts, and as an Advisor on Human Capital Development guides strategic issues in organisational and human capital capability. She also chairs Banyan Tree Global Foundation, the Group's sustainability arm.

She is also a director of the Wildlife Reserves Singapore Conservation Fund, Mandai Park Holdings, Singapore Art Museum, Denmark-based ISS A/S, and Dufry AG, Switzerland. In December 2017, she was appointed a Member of the Singapore Biennale 2019 Steering Committee. In March 2017, she was named the winner of the Supernova Category at the inaugural The Women Entrepreneur Award. She was inducted into the Singapore Women's Hall of Fame in 2018.

DAY 2

Mr. Toh Soon Huat

Executive Chairman
Novena Foundation Pte Ltd
Sian Chay Medical Institution



Founded Novena Group (Novena Holdings Limited) in 1984 and listed on the SGX in the year 2000.

Sold away his business in 2009 and currently involved in community service, charity work and investment.

In 2008, he volunteered to steer the 118-year-old Sian Chay Medical Institution when it was on the verge of closing down and has been its Executive Chairman since then. Sian Chay Medical Institution is a Voluntary Welfare Organisation registered with the Ministry of Health providing free Traditional Chinese Medicine consultation, subsidized medicine and treatment for the community regardless of race or religion.

During the decade of his volunteering at Sian Chay Medical Institution, Mr Toh Soon Huat led his Board and management team to raise over \$50 million to sustain the operations and expand the network of branches to 15 clinics and supported 4 wellness centers in Singapore. Sian Chay Medical Institution serves over 1,000 patients daily and about 50,000 patients a year.

Mr. Toh Soon Huat was named **Forbes Asia 2019 Heroes of Philanthropy**

Sessions	Speakers	Synopsis
Day 1 Keynote 9.20 – 10.10 am	Ms. Claire Chiang Co-founder, Banyan Tree	"Entrepreneurs leaving legacies". Key aspects on the minds and hearts of entrepreneurs and Founders concerning the transfer of wealth; family communication and conversations with the next generation family members.
Panel – Global 10.10 – 11am	Mr. Mark Smallwood Trust and Estate Practitioner (TEP), Owner, Rapier Consulting Ltd Mr. Josh Maxwell (America) Partner, Hone Maxwell LLP Mr. Gurdeep Singh (Middle East) Group Tax Consultant, Sovereign Wealth Company with 200 subsidiaries worldwide, GCC Government Mr. Peter Wyllie (New Zealand) Director/Shareholder, Helmores Wealth Limited Ms. Julie Teo [Moderator] Consultant	The global trends and developments affecting to old and new wealth. Recent succession planning solutions and dynamics and a survey of the taxation regime and reporting; what is at stake in the next few decades in the respective regions?
Tea Break: 1100 – 1120am		
Speaker – Singapore 11.20 – 12pm	Mr. Tan Woon Hum Partner, Shook Lin & Bok LLP	What do family business owners need to plan for their personal wealth creation and accumulation alongside their Founders' businesses? Independent Multi-Family Offices as a viable proposition in asset and wealth management and in creating intrinsic value for clients.
Panel – Singapore 12 – 12.40pm	Mr. Wong Look-Liew Chief Investment Officer, Hammer Global Investments Pte Ltd Mr. Johan Jooste Managing Director, The Global CIO Office Mr. Kendrick Lee Managing Partner, Raffles Family Office Mr. Ku Swee Yong CEO, International Property Advisor Pte Ltd Ms. Angela R Wong [Moderator] Partner, James Chai & Partners	How to engage Founders on inter-generational wealth succession—issues, strategies and maximising valuations. What are the triggers for clients (Family governance/ Investment in the Family Human Capital/ Sibling rivalry issues)? When should Founders let go of the helm of the family business? What are the circumstances when the family business should be divested and how exit strategies could be planned? Focus on family property portfolios succession and exit strategies.
Lunch: 1240 – 155pm		
Speaker – Singapore 1.55 – 2.25pm	Ms. Kim Faulkner CEO, Activiste Pte Ltd	According to the Institute for Family Business, the family business brand enhances perceptions such as trustworthiness and social responsibility. Why Founders need to invest in the Family Business brand for sustainability and posterity and how they could pass it down successfully across future generations. Are successful brands just lucky by their choice of a good brand name?
Speaker – Singapore 2.25 – 3.05pm	Ms. Kee Lay Lian Partner, Rajah & Tann Singapore LLP	Examining fallout and wealthy family spats. Siblings and heirs suing one other or coveting for shares of the family's fortune or company shares. Asian family disputes- conflict resolution.
Tea Break: 3.05 – 3.30pm		

Disclaimer: Details accurate as at date of print.

Sessions	Speakers	Synopsis
Panel – Wealth Succession and Financial Advisory 3.30 – 4.10pm	Mr. Luke Lim Executive Director, Phillip Securities Pte Ltd Mr. Alfred Chia Chief Executive Officer, SingCapital Pte Ltd, FPAS President Mr. James Foo Director and Consultant, Charles Monat Associates Pte Ltd Ms. Lorna Tan [Moderator] Head of Financial Planning Literacy, DBS Bank Ltd	The changing financial advisory & insurance landscape and environment- wealth succession as a strategy and driver in empowering advisers. What needs to be engaged with the prospect for successful client acquisition and retention?
Panel – Malaysia 4.10 – 4.50pm	En. Azhar Iskandar Hew Group CEO, Rockwills Group of Companies Ms. Chee Pei Pei Executive Director, Deloitte Tax Services Sdn Bhd, Malaysia Mr. Mike Grover External Consultant, Labuan International Business and Financial Centre Inc Sdn Bhd	What are some of the estate planning and tax issues for Malaysians and foreigners acquiring properties in Malaysia? What are the corporate and trust vehicles that foreigners could use to avoid probate and for succession planning? How attractive is Malaysia's Silver Hair programmes? The panel will also share developments in the offering of Labuan structures for the holding of assets and funds.
Panel – Wealth Succession Structures 4.50 – 5.30pm	Ms. Angela R. Wong Partner, James Chai & Partners Mr. Petrus Huang Co-Head, Investment Funds Director, Corporate & Finance, Drew & Napier Mr. Ng Chee Yuen Founder and CEO, Shenning Investments Private Limited Mr. Lee Chiwi [Moderator] CEO, PreceptsGroup International	An overview of the traditional structuring in private banking and asset management for family wealth in the last decades. Are these structures suitable largely during the Founders' lifetimes or are they geared to handle the passing of the baton to the heirs or for asset protection? What makes sense in the Family Office Structuring involving Private Trust Companies, Trusts and the Variable Capital Company.
End of Day		

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Sessions	Speakers	Synopsis
Day 2 Keynote 9.20 – 10am	Mr. Toh Soon Huat Executive Chairman, Novena Foundation Pte Ltd Sian Chay Medical Institution	From rags to riches and benefitting needy people. What is the real meaning in wealth? Mr Toh: “I suddenly realized that business success is just to yourself. If you can step out and help more people to gain happiness, your life will then be more enriching and meaningful.”
Speaker – Indonesia 10.10 – 10.40am	Ms. Ibu Henrietta Kristanto Managing Partner PB Taxand Indonesia	Trend in Indonesian tax audit affecting individuals' wealth post TA, effect of AEOI.
Panel – Standby Trusts and New Zealand Trusts 10.40 – 11.20am	Mr. Peter Wyllie Director/Shareholder, Helmores Wealth Limited	Why do many trustees not talk about standby trusts? The truth is that the standby trust is really what many families need as a flexible trust structure to work with wills, LPAs, insurance policies and the CPF Nomination. Why it works better than testamentary trusts? Why and where New Zealand trusts fit in the scheme of wealth succession planning and an alternative diversification of wealth? Digital Platform in the creation of trusts as the next lap?
	Mr. Alan Wong Principal Consultant, W3 Consultancy Pte Ltd	
	Mr. Leong Mun Kid Resident Manager, Precepts Trustee Ltd	
	Ms. Lie Chin Chin [Moderator] Managing Director, Characterist LLC	
Tea Break: 1120 – 1140am		
Panel – Hong Kong/ Taiwan 11.40 – 12.10pm	Mr. Sammy Hui Regional Director, FWD Life Insurance Company Ltd	How the 2019 disruptions in Hong Kong affect wealth management and succession, the lessons learned, awareness and opportunities? The migration not only of residents but also wealth flows and investments elsewhere? Will the Hong Kong impasse affect Taiwanese planning for wealth succession diversification?
	Mr. Martin Crawford Co-Founder & CEO, Acclime	
	Mr. Geoffrey Lee (Taiwan) Founder & Principal Attorney, Legato Law, California	
	Ms. Esther Fung [Moderator] HOD, Private Clients, PreceptsGroup International	
Panel – U.S Issues 12.10 – 12.50pm	Mr. Josh Maxwell Partner, Hone Maxwell LLP	U.S issues faced in Asian Wealth Business Succession Planning for families with U.S beneficiaries. How Foreign Grantor Trust (FGTs) are structured? Understanding inheritable wealth and taxes where persons are subject to U.S tax reporting. The structures that families residing outside the U.S need to plan for efficient tax and access to the global wealth for their U.S beneficiaries.
	Mr. Michael Liu Managing Director, CIL Group Ltd Trust and Estate Practitioner (TEP), Board Director of AOA (Asia Offshore Association), Rep of Northwest Trustee in Asia, Founder of Threshing Floor	
	Mr. Geoffrey Lee [Moderator] Founder & Principal Attorney, Legato Law, California	
Lunch: 12.50 – 2pm		

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Sessions	Speakers	Synopsis
Panel – China 2 – 2.40pm	Mr. Michael Liu Managing Director, CIL Group Ltd Trust and Estate Practitioner (TEP), Board Director of AOA (Asia Offshore Association), Rep of Northwest Trustee in Asia, Founder of Threshing Floor	China's population of people with over \$110,000 of wealth had grown to 100 million, and “for the first time” had slipped ahead of the United States with its 99 million people in the Credit Suisse Research Institute's global top 10% of wealth. What wealth advisers need to be prepared to handle wealthy Chinese seeking globally for wealth enhancement, protection and diversification. What are some structures and solutions that could be attractive including planning for acquisition of properties and settlement of family members for education evident in Singapore, Australia, the U.K and the U.S?
	Mr. James Zhang Jun CEO and Founder, Beijing Financial Alliance Technology (BFAT)	
	Ms. Kimmis Pun Board of Director, Financial Planning Standard Board USA	
	Mr. Alfred Chia [Moderator] Chief Executive Officer, SingCapital Pte Ltd, FPAS President	
Panel – Mental Incapacity and Special Needs Trust Structures 2.40 – 3.20pm	Mr. Chong Yue-En Managing Director, Bethel Chambers LLC	As a country's population ages, the legal issues affecting older people are both numerous and complex. Older people face a multitude of issues, including their financial viability, family dynamics, long-term planning for their health care, and end-of-life decisions. The panel will discuss issues on mental incapacity and special needs planning.
Panel – Philanthropy 3.20 – 4pm	Ms. Jane Binks Senior Director, Development, Yale-NUS College	The panel will discuss philanthropy trends and developments in Singapore and models elsewhere. How philanthropy fits in the Business Family CSR and succession strategy. Gifting can be well-intended but there are often a mismatch of donations without research and audit. The panel will discuss pitfalls when trying to do good and how good should be done wisely.
	Dr. Titus Yu Chairman and CEO, Wizard Financial Group Ltd	
	Mr. Robert Kee Executive Chairman, Operation Hope Foundation (OHF)	
	Mr. Lee Chiwi [Moderator] CEO, PreceptsGroup International	
Tea and Networking: 4pm to End of Day		

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Mr. Lee Chiwi
Chief Executive Officer
PreceptsGroup International

Mr. Lee Chiwi was called to the Bar of England & Wales as Barrister-at-Law in 1986 and was admitted as an Advocate & Solicitor of Singapore in 1988. In 2004, he was appointed as Chief Executive of British & Malayan Trustees Limited. He joined Rockwills Singapore in 2008 as Chief Executive and in 2019 started being solely at the helm of business under a refreshed brand of PreceptsGroup International Pte Ltd.

Widely recognised for his expertise in the Trusts industry, Mr Lee Chiwi is a TEP member of the Society of Trust and Estate Practitioners and served as Chairman of the Singapore STEP Branch in 2014/15. In 2015, he was also designated ChT (Chartered Trustee) by the Singapore Trustees Association, a title borne only by senior trust practitioners in Singapore.

Chiwi is a member of the Law Society's Probate Practice and Succession Planning Committee, and has been an adjunct lecturer at the Singapore Management University's Masters' program in Wealth Management, (Estate Planning and Tax). He has regularly been invited to speak at various seminars organized by the IRAS and the IBF. He is the author of various books including the "The Rockwills Guide to Succession and Trusts in Wealth Management", 3rd edition 2017.



Mr. Josh Maxwell
Partner
Hone Maxwell LLP

Mr. Josh Maxwell is a partner at Hone Maxwell LLP, and a licensed U.S. attorney and CPA. His practice focuses on international tax and federal, state and local tax issues, particularly civil and criminal tax controversy defense. Mr. Maxwell advises clients on a wide variety of international tax issues including the Offshore Voluntary Disclosure Program, FATCA, treaties, IRS informational reporting, and legal needs for expanding into the U.S. market. As a part of his international work, Mr. Maxwell travels throughout Mexico and Asia educating on U.S. international tax issues, U.S. business considerations and servicing clients. Through his controversial work Mr. Maxwell coordinates and defends clients during audits by the IRS, Franchise Tax Board, Board of Equalization, and EDD. Additionally, Mr. Maxwell works with clients on collection issues with the same agencies, including installment agreements, offers in compromise, and issues surrounding liens, levies, and wage garnishments.



Mr. Gurdeep Singh
Group Tax Consultant
Sovereign Wealth Company with 200 subsidiaries worldwide, GCC Government

Mr. Gurdeep is a seasoned Tax practitioner with 30 years of experience, a decade of which has been within leadership roles in Saudi Arabia, United Arab Emirates (UAE) and Kuwait.

Gurdeep's clients have included members of the ruling families and prominent business families in Saudi Arabia and the UAE covering international investment structuring and private wealth inheritance issues.



Mr. Mark Smallwood
(TEP)
Owner
Rapier Consulting Ltd.

Mark Smallwood has nearly 35 years' experience in the financial services, private banking and trusts and estates industry. He started as an independent financial advisor with Sedgwick Financial Management (now part of Marsh Inc.) in the City of London, before moving to the Caribbean where he established a multi-family office incorporating a trust company, insurance company, corporate services and asset management business. After selling these businesses in 2003 he moved to Switzerland to join Deutsche Bank Private Wealth Management as Global Head of Insurance Solutions. In 2009 he moved to Singapore as Head of Wealth Planning APAC, and spent 2 years in Hong Kong as Head of Strategic Initiatives within the combined Deutsche Asset & Wealth Management business. He was a Managing Director and served on the Executive and Management Committees of the various businesses. He has been a full member of the Society of Trust and Estate Practitioners for 20 years. He was born in Singapore and brought up in Hong Kong, Bangkok and Kuala Lumpur. His wife is from Guilin, Guangxi, China and his three young boys are fluent in Mandarin. Residing in the UK since 2019, he retains strong links to Asia and Asian clients.



Mr. Peter Wyllie
Director/ Shareholder
Helmores Wealth Limited

BA (Otago); LL.B (Canterbury); LL.M (E-Business (Monash)); Dip ITM (Distinction) (UK/Singapore); TEP

- Director/Shareholder at Helmores Wealth Limited
- Registered Trust and Estate Practitioner (STEP)
- Author and Co-author of articles published in both domestic and international legal and advisory publications
- Co-author of specialised legal textbook dealing with trusts
- Director of several NZ look through Limited Partnerships
- Protector for many NZ complying and foreign trusts, Charities, purpose trusts
- Current advisor to individuals and institutions resident both in New Zealand and overseas but with a particular focus on Asia.



Ms. Julie Teo
Consultant

Julie holds an LLB (Honours) degree from the University of Singapore and was admitted to the Singapore Bar as an Advocate & Solicitor in 1980. She is a member of the Singapore Academy of Law & STEP. Previously, she was a Trainer with Wealth Management Institute, Singapore from 2006 to 2014.

She has over 30 years of multi-jurisdictional experience working with private and institutional clients in Banking, Wealth Management, Trust & Estate Planning and Insurance sectors, and previously held regional management roles in multinational companies & international banks including Aon Singapore, BNP Paribas Wealth Management, Bank Sarasin-Rabo (Asia) Limited, Citi Private Bank, American Express Bank and Barclays Bank. Julie has extensive experience and expertise in private client matters and business advisory which has led her to be a trusted advisor to Asian private clients and family offices in the following areas: Trust Structuring & Estate Planning; Insurance Solutions; Business Succession Planning; Strategic Philanthropy; Family Office & Family Business Advisory/Family Governance.

She was a practicing lawyer prior to her current role as Advisor to her Asian clients.



Mr. Tan Woon Hum
Partner
Shook Lin & Bok LLP

Tan Woon Hum is a partner with one of Singapore's major law firm Shook Lin & Bok LLP. He has more than 23 years of experience as a professional lawyer. He heads the Trust, Asset & Wealth Management practice and is widely regarded as one of the rare market leaders specialising in investment funds, REITs, trusts and private wealth. He advises numerous fund managers, wealth managers and EAMs, setting up Singapore and Cayman funds, getting CMS licences, RFMC & VCFMC approvals, setting up family offices and private trusts, including Section 13X structures. He holds a law degree as well as a MBA (Finance). He has been a sought after speaker and speaks regularly at public conferences and seminars for more than 17 years in Singapore, Beijing, Hong Kong, Vietnam and Malaysia and also conducts professional training courses (including Euromoney, Courses & Seminars & Henley Business School hedge funds programmes). Woon Hum has been recognised as a leading funds lawyer by Chambers Asia-Pacific 2012 to 2019, The Legal 500 Asia Pacific 2017 to 2019, and Best Lawyers Singapore 2013 to 2020. He is also recommended for his expertise in real estate in The Legal 500 Asia Pacific 2014, 2015, 2017 to 2019, and in private wealth in the 2019 edition. Woon Hum is also cited as a notable practitioner in IFLR1000 2018 and 2019.



Mr. Wong Look Liew
Chief Investment Officer
Hammer Global Investments Pte Ltd

Mr Wong Look Liew has more than 20 years experience in Capital Markets and stints in Real Estate Property Technology Investments and Private Banking. With his strong business acumen and capital markets' contacts, he is CIO of HGI and works with budding entrepreneurs and growth entities with dynamic business models and innovative visions to expand and grow internationally. The Hammer group also engages in Advisory services for clients seeking cross-border M&A opportunities. Mr Wong's experience and strong market network has enabled him to stay competitive and relevant in managing clients, investors' needs in the rapidly evolving marketplace of corporate change, business and wealth succession issues and desired growth of wealth.



Ms. Henrietta Kristanto
Managing Partner of PB Taxand
Taxand Indonesia

Henrietta is the Managing Partner of PB Taxand – Taxand Indonesia.

She specializes in taxation for corporation and individuals. She has advised on a number of tax strategies, corporate restructuring, international tax, tax dispute, tax compliance as well as individual tax and estate planning.

Her tax qualifications include Tax Certificate C, Licensed Tax Consultant, Licensed Tax Attorney and a Certified Wealth Manager.

She participates in The Employers' Association of Indonesia (APINDO), Indonesian Tax Consultants Associations (IKPI), Certified Wealth Managers Association (CWMA), and Toastmasters International.

Her bachelor degrees are in Finance from Texas A&M University and in Law from 17 August 1945 University and a master degree from the University of Texas, Dallas.

**Ms. Angela R. Wong**

Partner
James Chai & Partner

An accomplished legal practitioner in-corporates commercial and financial services, with over 20 years of diverse professional legal experience in the field, Angela R. Wong has consistently demonstrated her vision, passion and diligence necessary to be successful.

Angela is a seasoned private wealth and asset management lawyer who advises and provides solutions to her clients internationally.

As an experienced counsel, she played a pivotal role in the successful creation and management of her clients' investment structuring efforts, business reorganisation, corporate alliances and mergers and also creating private wealth succession and legacy plans for their estate and varying needs.

In this area, Angela has organized family offices and its systemization, family office next-generation mentoring, philanthropy structuring and the necessary regulatory organization, licensing, compliance that cover corporate commercial and financial enhancement and structuring.

In private wealth and asset management structuring, her experience encompasses a wide variety of investment strategies across asset classes; sectors which, inter alia, includes vanilla investment structures, alternative investments, debt and project financing, agriculture, renewable and impact investments, private real estate development projects and luxury investments.

Over the last two decades, Angela's profile of clients includes a mix of financial institutions, fund managers, insurance companies, family-owned businesses, (patriarchs/matriarchs and/or next-generation) family offices and individuals with significant wealth.

Drawing upon her experience and knowledge in the law, as well as her organizational and project leadership abilities, Angela is a Partner and currently leads the Corporate, Asset and Wealth Management Practice with James Chai & Partners - a boutique law firm, which over the past 30 years, based in Singapore, has provided services in matters of civil and criminal litigation, family office and legal services in private wealth enhancement, legacy preservation, legal and corporate commercial work.

Angela graduated with an Honours Bachelor of Law, from the University of Wolverhampton, UK. She was called to the bar of England and Wales in 1996 as a Barrister-at-law and is also a member of the Honorary Society of Gray's Inn, London.

She was admitted to the Singapore Bar as an Advocate and Solicitor of the Supreme Court of Singapore in 1998.

Prior to James Chai & Partners, Angela has served with Allen & Gledhill, Arfat Selvam & Gunasingham (ASG Corporation), Tan Kok Quan Partnership and worked as internal counsel at Deutsche Bank AG and the French law firm of Cotty Vivant Marchisio & Lauzeral, in the capital market, wealth management and corporate commercial fields.

As a result of her past track record in the international financial services arena and her work at major Singaporean legal firms, Angela R. Wong has earned her place in the distinguished network of leading legal, asset and wealth management professionals.

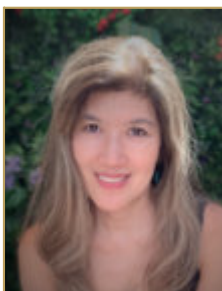
**Mr. Kendrick Lee**

Managing Partner
Raffles Family Office

Kendrick started his professional career as a national shuttler, representing Singapore in numerous major games before making a career switch to the Wealth Management industry.

Kendrick served as a Private Banker for 8 years with CIC, Pictet and Credit Agricole Indosuez before joining Raffles Family Office. He now serves as a Managing Partner of Raffles Family Office.

Kendrick holds a Bachelor of Science in Management from the University of Manchester.

**Ms. Kim Faulkner**

CEO
Activiste Pte Ltd

Ms. Kim Faulkner has over 35 years of branding, marketing and design experience in Asia. As the CEO of Activiste, Kim continues to be actively involved in strategic projects for institutions and businesses across the Asia Pacific.

She was previously the CEO and Chairman of Interbrand in Singapore for 15 years; board member of the international Group and on the Group Steering Committee overseeing the strategic initiatives of the group's 36 offices.

She has served on numerous Singapore government boards, including as board member of Spring Singapore; the DesignSingapore Council; International Enterprise Singapore; and the advisory board of the Temasek School of Design.

**Ms. Kee Lay Lian**

Partner
Rajah & Tann Singapore LLP

Ms. Kee Lay Lian graduated from the National University of Singapore in 1985 and is called to the bar in 1986.

She is listed as a Preeminent family lawyer in Leading Singapore Family for Divorce Lawyers, 2015 by DoYLES Family Lawyer Guide and Leading Lawyer in Benchmark Litigation Asia Pacific 2019 Edition for being a Dispute Resolution Star for Family and Matrimonial Practice and Private Clients.

She is an associate mediator and accredited Collaborative Family Practitioner with the Singapore Mediation Centre, a Fellow of the International Academy of Family Lawyers, a member of STEP and a Parenting Coordinator with the Family Justice Court. She has more than 3 decades of experience and handles assets disputes of high net worth clients. She also acts in contentious succession and trust disputes.

**Mr. Luke Lim**

Executive Director
Phillip Securities Pte Ltd

As the Managing Director of Phillip Securities Pte Ltd (PSPL), Luke oversees PSPL's daily operational businesses, strategic directions and executes management decisions for performance-driven results in consultation with the board of directors. He honed his management leadership style and has been responsible for various roles in the PhillipCapital Group of companies, overall strategy and business development.

He co-founded Poems Venture and was appointed Deputy Chairman of the Securities Association of Singapore (SAS) in 2015, where he provided stewardship and guidance to fellow members.

Luke graduated from Imperial College London with a Bachelor of Electrical and Electronic Engineering and obtained a Master's degree in Business Administration from Nanyang Technological University.

**Mr. Alfred Chia**

(BSc, CFP, FChFP, ChFC, SAMP, Affiliate of STEP)
Chief Executive Officer
SingCapital Pte Ltd
FPAS President

Mr. Chia is the CEO of SingCapital which is a Financial Advisory firm licensed by the Monetary Authority of Singapore (MAS).

He has more than 25 years of experience in the financial advisory field serving both individuals and corporations. He also sits on the board of various real estate funds as an independent director and advisory board member.

He is currently serving as the President of the Financial Planning Association of Singapore (FPAS).

His insights and perspectives on various financial matters are regularly interviewed by numerous media channels from radio to TV.

Alfred's passion to share has also prompted him to author 3 books, 'Mortgage and Grow Rich', 'Grow Rich Singapore Style' and 'Last Wishes'. The books are dedicated to holistic financial planning towards financial well beings.

**Mr. James Foo**

Director and Consultant
Charles Monat Associates Pte Ltd

Mr. James Foo is a Director and a Consultant at Charles Monat Associates Pte Ltd. His core advisory expertise centers around the needs of High Net Worth clients in Southeast Asia. Graduating from the National University of Singapore with a Bachelor of Arts, James spent 7 successful years building his experience in financial services advisory, spanning wealth advisory team lead roles across Standard Chartered Bank and DBS Bank, serving the Southeast Asia markets.

With a strong focus on client experience and service, James continues to be an advocate for personal wealth protection, wealth transfer and asset allocation. Prior to being a banker, James had 10 years experience with various disciplines in the retail/consumer goods sector covering Indonesia and Southeast Asia.

Over the years, James' client servicing and wealth advisory experience have allowed him to develop both intuitive and in-depth industry knowledge in the areas of wealth advisory strategies.

**Ms. Lorna Tan**

Head of Financial Planning Literacy
DBS Bank Ltd

Lorna Tan is Head of Financial Planning Literacy at DBS Bank. Prior to joining DBS, she was the Invest Editor at The Straits Times for more than 10 years, covering finance, money management and consumer protection issues. Lorna has won numerous awards for excellence in business reporting and public service journalism.

Lorna is also an adjunct Assistant Professor at the National University of Singapore, School of Business, where she lectures in personal finance.

She is the author of four bestsellers: Money Smart – Own Your Financial Destiny, Retire Smart – Financial Planning Made Easy, More Talk Money and Talk Money.



En Azhar Iskandar Hew
(TEP)
Group Chief Executive Officer
Rockwills Group of Companies

Azhar is also the Director of Rockwills Advisory Services Sdn Bhd and holds the Bachelor of Laws (Honours) degree from the University of London. Prior to his current position, he served as the Deputy CEO of Rockwills Trustee Berhad. He joined Rockwills in June 1997 as a Legal Executive and later became the Head of the Training Department. In order to gain the necessary experience in the trust industry, he became the Vice President, Legal of a reputable trust company in 2003. He rejoined the Rockwills Group in 2005 as the General Manager of Rockwills Trustee Berhad to begin its operations. During his time at Rockwills Trustee Berhad, he has spearheaded the creation of various innovative trust products and services including BVPT, UDeclare, UPrepare, OPC Trust and Pet Trust, which sets the company apart from its competitors.

Azhar is a member of the Society of Trust and Estate Practitioners (STEP) and is an Associate Financial Planner (AFP) holder. He has more than 22 years of experience in the estate planning industry as a will and trust practitioner and speaker. Over the years he has trained more than 11,000 people primarily from leading financial institutions and life insurance companies as well as financial planners in Malaysia, Hong Kong and Singapore. Occasionally, he facilitates courses on estate planning that are approved by the Securities Industry Development Centre (SIDC), Financial Planning of Malaysia (FPAM) and The Federation of Investment Managers Malaysia (FIMM). He was a regular article contributor to Smart Investor and Malaysian Business on the areas of Estate Planning and Private Trust.



Ms. Chee Pei Pei
Executive Director
Deloitte Tax Services Sdn Bhd, Malaysia

Pei Pei is currently the Leader for Deloitte Private in Malaysia serving business owners, family groups and high net worth individuals in areas including succession planning, international tax, estate planning and wealth preservation.

She has more than 30 years of work experience at Deloitte and other Big Four organizations in Malaysia and Australia. Her experience covers individual taxation, employment and compensation structuring, advising HNWI on financial investment products, tax restructuring for succession planning.

She is also a frequent guest speaker at various events and briefings on topics relating to CRS implications on investors and tax implications on wealth planning conducted by private bankers and high net worth individuals.



Mr. Mike Grover
External Consultant
Labuan International Business and Financial Centre Inc Sdn Bhd

Mr. Grover was formerly a tax specialist with the Labuan International Business and Financial Centre Inc Sdn Bhd to help investors better understand Labuan's flexible tax framework and the opportunities presented by Malaysia's extensive tax treaty network and was instrumental in the strategy to share with Asian Families the Wealth and Estate Planning opportunities provide by the Labuan Trust and Labuan Foundation. He is a chartered accountant and a tax specialist having been a senior partner with Ernst & Young in a number of locations including Singapore, Australia, Malaysia, Brunei, Hong Kong and China.



Ms. Lie Chin Chin
Managing Director, Characterist LLC

Chin Chin heads the Family & Matrimonial Law and the Property & Real Estate Departments of Characterist LLC. She has garnered more than 27 years of experience as a practising lawyer in Singapore, representing a wide range of clients. She has fought and defended causes at all levels of the Singapore Courts. Under her leadership, her firm has received multiple awards and is well recognised in the areas of Family and Matrimonial Law and property and Real Estate Law.

Chin Chin is highly experienced in the area of estate planning and has advised individuals from all walks of life on drafting their Wills and Lasting Powers of Attorney, and setting up Trusts. She is well-versed in the myriad legal and commercial considerations when assisting her clients in making plans for their and their families' future.

Chin Chin is also the author of the book 'Instant Legal Protection For Your Family'.



Mr. Alan Wong
Principal Consultant
W3 Consultancy Pte Ltd

Alan Wong, AFP®, AEPP®, is the Principal Consultant of W3 Consultancy Pte Ltd which provides training and consultancy services in the specialized field of Business Protection Planning. He has won awards for the Trust businesses he has completed.

He has trained numerous financial consultants from insurers as well as IFAs. A financial consultant himself with more than 15 years of experience, he focuses his practice on planning for Business Owners using estate planning. He is highly effective in penetrating this market and often able to win over clients from banks and other intermediaries who serve the Ultra HNW individuals and business owners.



Mr. Leong Mun Kid
Resident Manager
Precepts Trustee Ltd.

Mr. Mun Kid graduated with a law degree from the University of London. He has a Certificate in Trust Services (CTS) with Wealth Management Institute (WMI), Nanyang Technological University.

He is the head of the department for trust in Precepts Trustee Ltd. and has been appointed as a resident manager under criteria set out by MAS for a licensed trust company. He manages the setting up and administration of trust in Precepts Trustee Ltd and assists clients in their estate and trust planning.

Prior to joining Precepts Trustee Ltd, Mun Kid was a manager in the legacy planning department in Rockwills Trustee Bhd (Malaysia) taking charge of setting up a private trust for clients. Since 2011, Mun Kid has been actively involved in estate planning for a multitude of clients and has extensive experience in setting up trusts for families in Malaysia and Singapore.



Ms. Esther Fung
HOD, Private Clients
PreceptsGroup International

Ms. Esther Fung holds a Master of Science in Wealth Management, Singapore Management University & an MBA from Southeastern University, USA. She is a member of the Society of Trust and Estate Practitioners "STEP".

She has over 20 years of working experience advising high net-worth Asian clients and their families in the areas of succession planning, estate planning and family office offering. Previously, she held roles in wealth management, trust and estate planning in international banks including DBS Private Bank, BNP Paribas Wealth Management, Scotiabank (Asia) Limited, HSBC Capital (Canada) Limited.

Esther has considerable expertise in private client work which includes trust structuring & estate planning; succession planning; insurance-led solutions; family office & family governance. She is also a frequent speaker and trainer at bank and client events & seminars in her previous role(s). Esther is bilingual in English and Mandarin.



Mr. Hui Wai Chung Sammy
(MBA, TEP, AEPP, CFP, IPA)
Regional Director
FWD Life Insurance Company Ltd

Mr. Sammy Hui has been in the financial planning business for over 25 years and an MDRT life and qualifying member. To cater for the needs from globalisation and the aging population, he started focusing his practice on wealth succession, family trust and pre-immigration planning for clients in Hong Kong and Mainland China with very positive results both in terms of business and professional image. Mr Hui also leads a team of professional consultants to achieve bigger success. With the vision to upgrade and reposition our profession, he also teaches courses, including AEPP®, of family trust and wealth succession planning in universities and academic institutes.



Mr. Martin Crawford
Co-Founder & CEO
Acclime

Mr. Martin Crawford is one of the most experienced corporate services executives in Asia. Prior to setting up Acclime, Martin was the Group CEO of Vistra from 2009 to 2018, where he built the firm from a regional player to be the top three global corporate services providers, expanded the geographic reach from five countries to 46 jurisdictions.

Prior to Vistra, Martin spent over 15 years leading medium and large companies across the Asia-Pacific region in offshore financial services, foreign exchange and asset management. Martin spent his early career in Australia in sales and marketing roles before moving to Europe to further his academic studies. He worked with Bain & Company in London before relocating back to Australia where he spent seven years managing the institutional funds management division at MLC. Prior to his move to Asia, he was Regional Managing Director for Travelex PLC.



Mr. Ng Chee Yuen
Founder and CEO
Shenning Investments Private Limited

Mr. Ng founded Shenning Investments Private Limited in 2011. Shenning Investments is a licensed fund management company in Singapore which specializes in Private Equity Investment Management and Wealth Management. Mr. Ng is also the founder of Shenning Corporation Private Limited, an asset management and advisory company.

Mr. Ng was the Chairman of the Capella Hotel Group for 9 years, and he is currently the Chairman of the NTUC First Campus Cooperative, a Board Member of the NTUC Healthcare Cooperative, as well as a Board Member of the Embassy Capital Limited licensed by DFSA in Dubai.



Mr. Geoffrey Lee
Founder & Principal Attorney
Legato Law, California

Mr. Geoffrey Lee is the Principal Attorney and Founder of Legato Law. He enhances the firm's offerings with several definitive areas of expertise. His work in estate planning, probate administration and trust administration is widely commended by clients who find comfort in his ability to bring clarity to a complex process. With attention to detail and a skilled understanding of every aspect of estate legal affairs, Geoffrey provides the knowledge and support necessary to help clients. His professional talents are complemented by vast international business experience. His previous employments include multinational corporations in Singapore, Hong Kong, San Francisco, and New York.

As a result of his extensive overseas business travels and family background, he is fluent in several languages and dialects, including Mandarin, Cantonese and Shanghaiese. This knowledge of languages and cultures, combined with excellent communication and interpersonal skills, enables him to meet the needs of ethnically diverse clients who might not otherwise be able to conduct their legal business with complete comfort and confidence.



Mr. Johan Jooste
Managing Director
The Global CIO Office

Johan Jooste is an investment strategist with 25 years' experience, building and running investment processes and teams across all the major asset classes. He is the managing director of the Global CIO Office, a Singapore-based outsourced CIO services business.

They are part of the rapidly growing outsourced CIO services industry and their team of industry experts has considerable experience in delivering top quality investment products and advice. The Global CIO Office partners with single and multi-family offices and small wealth management businesses to supplement investment teams and provide a complete solution on a white labelled basis. With a broad, global network, The GCIO also offers its clients privileged access to private equity, venture capital and real estate opportunities.



Mr. Michael Liu
Managing Director of CIL Group Ltd
Trust and Estate Practitioner (TEP)
Board director of AOA (Asia Offshore Association)
Rep of Northwest Trustee in Asia
Founder of Threshing Floor, knowledge platform for wealth management

CIL Group Ltd was founded by Michael in 2001, with 3 offices in Shanghai, Christchurch, and Seattle. CIL has its core business in the field of offshore incorporation and trust, dedicated to offering wealth management solutions in global tax and investment optimization, privacy, succession and protection for HNWI clients. Many years of dedication makes CIL become the leader in its field of practice.

Michael has been engaging in the offshore financial industry for more than 18 years, and he is good at using vehicles such as incorporation, trust, foundation, insurance, loan, and anonymity to achieve the goals in international trading, outbound investment and family wealth management with privacy, succession, protection and tax-efficiency for the clients.

One of Michael's strength is designing and employing plans for tackling CRS and FATCA issues.

In 2016, Michael founded "Threshing Floor", no.1 KaaS (Knowledge as a Service) platform for the wealth management industry, the vision of this platform is "Connect and Empower", i.e. connect the leaders who can impart real knowhow to help others to be successful in their real-world practice.

Michael is also a frequent speaker and powerful trainer in various wealth management forums in China, and has published articles in many professional publications such as China Economic Review, CBN Weekly, China Business, Global Business & Finance, Wealth Management and China Offshore.



Mr. James Zhang Jun
CEO and Founder
Beijing Financial Alliance Technology (BFAT)

Mr. James Zhang Jun is the CEO and Founder of Beijing Financial Alliance Technology (BFAT). As the strategic partner of Financial Planning Standard Board (FPSB CHINA), BFAT is aiming to provide state-of-art support and consulting service to Enterprises, Financial Institutions, financial planners and individual investors. Until now BFAT has built up the strategic relationship with over 20 banks in China and over 30,000 financial planners have registered on the BFAT APP platform.

James Zhang has over 12-year experience in the banking business both in China and globally, including China Merchants Bank, Industrial & Commercial Bank of China (ICBC) and Deutsche Bank Germany respectively. James also has an 8-years insurance management experience in China. He was the Chief bancassurance officer of Allianz China and General Manager of AXA Hebei Branch. James Zhang is the visiting Professor of Hangzhou Financial Institution and holds an MBA degree at Beijing University.



Ms. Kimmis Pun
Board of Director
Financial Planning Standard Board USA

Ms. Kimmis Pun is the current Board of Director of Financial Planning Standard Board USA since 2017 and the Past President of Financial Planning Association of Singapore from 2011 to 2015.

At present, she is the Senior Managing Director, Head of Greater China, of a Swiss Bank.

She has MBA from Manchester Business School, University of Manchester, and professional qualifications CFP, ChFC, CWMA, AIF, AEPP and IBFA. She is also the IBF Fellow awarded by IBF.

Being a strong believer in philanthropy and life-long learning, she speaks frequently in various international seminars, gives interviews to media and gives lectures in many Singapore and regional universities for the past 15 years.



Mr. Chong Yue-En
Managing Director
Bethel Chambers LLC

Mr. Yue-En Chong has practiced in the area of Mental Capacity Law since 2010, first as a Legal Service Officer in the Attorney-General's Chambers, and later in private practice. He is the only person in Singapore who has an LLM (Social Care Law), with research focusing on protecting patients from financial abuse. He was the lead attorney on Re TQR [2016] SGFC 98, a landmark case where deputies were awarded investment powers. He is currently one of the leading figures in Singapore in the mental capacity law and practice space.

Yue-En is also a registered Professional Donee and Deputy, a member of the Law Society's Probate Committee, and an affiliate member of the Society of Trust and Estate Practitioners (STEP). He frequently engages the Office of Public Guardian, the Family Justice Court and the Ministry of Social and Family Development on MCA related matters.



Mr. Robert Kee
Executive Chairman
Operation Hope Foundation

Mr. Robert Kee is the Founder of OHF and works full time as an unpaid Executive Chairman. Since 1995, he has been actively involved in various poverty alleviation and social enterprise projects in Cambodia, Philippines and Nepal, particularly with the Methodist Mission Society and was instrumental in starting their COSI Children Village in Cambodia. He is an entrepreneur and has started and successfully built up three companies in the I.T. industry. Robert was a Past President of the Lions Club of Singapore, Bedok as well as an enthusiastic amateur magician. He is a Colombo Plan Scholar and holds a B. Eng Electrical (1st class Hons., University of Auckland) and an M.Eng (National University of Singapore).



Ms. Jane Binks
Senior Director, Development
Yale-NUS College

Ms. Jane Binks currently holds a Senior Director position at Yale-NUS College. Prior to this, she was the Founder of Jane Binks Pte Ltd, and she specializes in strategy and capacity development with an exceptional record of building relationships with diverse stakeholders to drive change and create impact. Ms. Binks focuses on and expertise in working with and across corporate, NGO, QANGO and government enterprises. In addition, Ms. Binks is also leader-motivated in helping teams and organisations develop strategy and capacity to meet their objectives.



Dr. Titus Yu
(MBA, TEP, AEPP, CFP, IPA)
Chairman and CEO
Wizard Financial Group Ltd

Dr. Titus Yu is loyal to his career for 37 years leading 1000 Financial Advisors serving over 200,000 clients, the godfather of the insurance industry; since 2010 he started developing Family Office service. He is loyal to his faith, dedicated to serving God, is the only Doctor in Ministry in the insurance industry; he spent 50/50 time on business and Christian ministries in the last 30 years. He is developing BAM (Business As Mission) in Ghana with fish farming and Chinese Food trucks.

Mission Statement: Live an Abundant Life

**Mr. Ku Swee Yong**

CEO

International Property Adviser Pte Ltd

Mr. Ku Swee Yong is the CEO and the Key Executive Officer of International Property Advisor Pte Ltd as well as a Co-founder of HugProperty.com. From Nov 2013 to Nov 2016, he was concurrently the CEO of Century 21 Singapore. Prior to running his own practice, he was a Director in the Real Estate Centre of Expertise at Société Générale Private Banking, responsible for advising clients on real estate investments, the Director of Marketing and Business Development at Savills Singapore and the General Manager at Far East Organization's Indonesia office.

He holds an MBA in Marketing from University of Hull, UK, and completed his BSc in the Imperial College, University of London, UK and the Institut Louis Pasteur, Université de Strasbourg, France.

Mr. Ku Swee Yong's opinion is regularly featured in the Straits Times, Business Times, 新明日报, 联合早报, Channel NewsAsia, TODAY, etc. He has published 5 books on the property market: Real Estate Riches, Building Your Real Estate Riches, Real Estate Realities, Weathering a Property Downturn and Preparing for a Property Upturn. He is also an adjunct faculty at Lee Kong Chian School of Business in Singapore Management University and the School of Design and Environment in Ngee Ann Polytechnic. In 2016 and 2017, he taught at the Department of Real Estate in the National University of Singapore.



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Complete your Advisory Business



By acquiring the know-how on Estate Planning

- Wealth distribution using instruments from Wills to Trust structures
- Understand the role of insurance in Estate Planning



By differentiating yourself from competitors

- Service existing clients' increasing need for succession planning



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- AEPP® is awarded by the Society of Will Writers (SWW) of United Kingdom and Estate Planning Practitioners Limited (EPPL)



Join the Associate Estate Planning Practitioner (AEPP®) with 95% course fee grant* and CPD hours

* Terms and Conditions apply for the Institute of Banking and Finance-Financial Training Enhanced Grant Scheme

Course Fee: \$1,200 + \$84 GST [SkillsFuture credit may be used]

Designation Fee: \$250 (early bird); \$300 (standard)

Continuing Professional Development: 12 CPD hours (50% Skill; 50% Knowledge)

About AEPP®

A 2-day marketing-based course for professional financial advisers to offer estate and succession planning advice to enhance their core services. The AEPP® designation can be earned and used as a professional qualification title/credentials.

Various AEPP® Advanced Modules are also available.

About Precepts Academy

Precepts Academy (previously known as Rockwills Institute) is the body that champions literacy in estate and succession planning as a professional practice throughout Asia via training, seminars, conferences and exchange of ideas. It has established a strong reputation in Singapore, Malaysia and Indonesia while spreading its presence in Hong Kong and China.

Our Designee Holders: Over 5000 AEPP® designees in Asia

Our Presence: Singapore, Malaysia, Indonesia, China, Hong Kong

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