5TH SEPTEMBER 2024 (THURSDAY) | HONG KONG OCEAN PARK MARRIOTT HOTEL

ESTATE PLANNING AND WEALTH SUCCESSION ASIA FORUM 2024

HONG KONG

FUTURE-PROOFING FAMILY LEGACIES

Organised by

EPPL Estate Planning Practitioners Limited

Supported by

PRECEPTS ACADEMY

The Society of Will Writers

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About the Event

Embarking on its 3rd edition, the Estate Planning and Wealth Succession Asia Forum is set to make history as it ventures overseas for the very first time! Originating in Singapore in 2018, this renowned forum, tailored for a professional audience, revolves around the pivotal themes of legacy and succession planning.

Anticipating the participation of over 200 delegates hailing from diverse corners of Asia, including Singapore, Malaysia, Indonesia, Hong Kong, China, and even the United Kingdom, this edition promises a dynamic gathering of industry experts.

Attendees will have the unique opportunity to gain insights from esteemed speakers who will delve into the intricate challenges faced by modern Asian families navigating the complex landscape of legacy and succession.

Join us for this groundbreaking edition as we bring together a wealth of expertise and foster meaningful discussions. Don't miss your chance to be part of this transformative experience!

Featuring

8 panel discussions

Includes discussions on
Country-specific issue

Global panel of over
30 esteemed speakers

Number of Delegates:
200-250

Profile of Delegates:

- **Financial Advisors and Insurance Advisors**
- **Trust Specialists**
- **Bankers**
- **Family Office Specialists**

ENG

Language:
English

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Why you should attend

1. Gain insights from highly regarded thought leaders on pertinent topics
2. Hear differing perspectives in panel discussions and real-life examples
3. Understand key concerns of your clients for more value-added advice and more effective client engagement
4. Networking opportunities

Who should attend

- Wealth Advisers – Family Office Professionals, Bankers, Fund Managers, Accountants, Financial Advisors, Real Estate Professionals, Insurance Professionals and Legal Professionals.
- Estate and Succession Practitioners and AEPP® designees
- Anyone keen to hear first-hand from industry experts on the issues relating to global trends and developments in governance and estate planning structuring.

Sponsorship opportunities available.

Please email us at

info@epplasia.com

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Estate and Wealth Succession Asia Forum 2024 Ticket Pricing

	Public		AEPP®	
Type	SGD	USD	SGD	USD
Early Bird	480	380	420	330
Standard	530	420	470	370

Tickets Details

1. AEPP® Early Bird Tickets are only limited to 100 tickets
2. Public Early Bird Tickets are only limited to 50 tickets
3. Early Bird tickets closing purchase date is 30th June 2024
4. The convention ticket includes lunch and tea breaks at the event venue
5. Tickets purchased are non-refundable. Please refer to our event terms and conditions for more details
6. Convention ticket does not include accomodation or flight. Participants are encouraged to make their own travel arrangements early

DAY 1

S/No	Topic	Timings	Panelists	Synopsis
1	Opening of Forum	8.30 am to 8.45 am	Lee Chiwi, Chairman, EPPL	Welcome Speech by EPPL Chairman
2	Keynote Speech by Guest of Honour	8.45 am to 9.10 am	Angel Chia Executive Director Hong Kong Academy for Wealth Legacy	Hong Kong has not only established its position as a global wealth management centre, but also as a global hub for family offices. The launch of the Hong Kong Academy of Wealth Legacy in Nov 2023 is yet another great initative to bolster Hong Kong as a key centre for managing family wealth legacies. Let's take a look at how Hong Kong can continue to leverage its core competence to cultivate talent and foster collaborations in the global ecosystem for estate planning and wealth sucession. How can Hong Kong wealth management industry seek to enhance entrepreneurs' overall management capability in wealth succession?
3	Panel 1: The plethora of wealth succession issues for the Asian client today	9.10 am to 9.50 am	1. David Koay (Moderator) 2. Aaron Li 3. Geoffrey Lee 4. James Hartland 5. Anthony Yuen	The panel will discuss about the global diaspora and wealth taxation regimes — the impact of mobility and relocation on inheritance planning, and tax planning. With a focus on the Asian client today, the panelists will speak on the issues of changing family dynamics affecting wealth succession and the significance of family value as a foundation to generational wealth transfer.
4	Morning Tea Break	9.50 am-10.00 am		
5	2nd Panel: Sense and Sensibility in life insurance proposition for families	10.00 am to 10.45 am	1. Leong Mun Kid (Moderator) 2. Sammy Hui 3. Alan Wong 4. Chris Tse	How do we optimise insurance planning for families through integration with trust structures? The speakers will discuss concepts such as standby trust, the trust as a family bank and wealth accumulator as well as the use of insurance-funded Buy-Sell Agreements for business owners.

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6	3rd Panel: Hong Kong in the spotlight, as a Gateway to China and Asia Pacific	10.45 am to 11.30 am	1. Cindy Wong (Moderator) 2. William Ling 3. Ashley Ong 4. Alan Fong	In this panel, the speakers will share insights on how Hong Kong's role as a gateway to China and Asia Pacific has evolved over time and how it can be an ideal location to engage the Chinese HNW client with global assets and international families in a dialogue on estate and legacy planning.
7	Lunch	11.30 am to 12.20 pm		
8	Introduction to The Society of Will Writers	12.20 pm to 12.45 pm	Anthony Belcher	Introduction to The Society of Will Writers
9	4th panel: Entrepreneurship and Wealth	12.45 pm to 1.30 pm	1. Jessica Cutrera Papadopoulos (Moderator) 2. Yang Eu Jin 3. Sim Sze Kuan 4. Joanna Hotung	The panel will discuss the critical concerns successful entrepreneurs face in wealth preservation and transfer, business exit strategies as well as family business succession. Various solutions will also be discussed including pre-IPO planning for holding of founder's and key employees' shares, setting up of family offices in Hong Kong and Singapore and structures for long term wealth planning (PTCs, VCCs) . The panel will also take a close look at family governance, grooming of the next generation and the growing trend of younger family members prioritising social good and community inclusion while maximising investment gains.
10	5th panel: Malaysia in the spotlight: Truly Asia	1.30 pm to 2.15 pm	1. Azhar Hew (Moderator) 2. Chee Pei Pei 3. Carolyn Oh 4. Masdayana Md Setamam	The panel will delve into what Malaysia has to offer to the HNW clients and business owners for estate and succession planning, focusing on the relevance of Labuan trust structures, the tax regime and incentives, the recent developments on Malaysia My Second Home (MM2H) Programme and its impact on retirement planning by foreigners.
11	Tea Break	2.15 pm to 2.30 pm		

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12	6th panel: Estate and Trust disputes — a focus on mental capacity and the vulnerable	2.30 pm to 3.15 pm	1. Ang Kok Chin (Moderator) 2. Nick Ash 3. Alfred Ip 4. Andre Yeap SC	Mental capacity and the vulnerable are among the key themes in many private wealth disputes, which has seen a rising trend given the ageing population and increasing level of wealth transfer. Safeguarding the interests of the mentally incapacitated and vulnerable beneficiaries is also a growing concern. The panelists will give their perspectives on these issues, discussing the significant risks to avoid and best practices for a robust estate plan.
13	7th panel: Insights to the estate planning and wealth succession advisory business for the financial intermediary	3.15 pm to 4.00 pm	1. Lee Chiwi (Moderator) 2. Azhar Hew 3. Johann Tay 4. Ricky Khoo	The discussion will be on understanding the Estate and Succession Practitioner proposition for estate planning in holistic financial planning services, the platform and processes. How can an financial advisory organization acquire clients exponentially using Estate Planning?
14	8th panel: The Future of Money - Digital Assets, NFTs and Tokenization	4.00 pm to 4.45 pm	1. Ku Swee Yong (Moderator) 2. Winston Quek 3. Clarence Chong	Digital assets and blockchain technology are shaping new frontiers for wealth managment as laws and regulations are keeping pace with the new investment landscape. The panel will share insights on the implications of tokenization on family wealth and succession planning and how can digital assets be passed down to the next generation and avoid being lost in cyberspace.
15	Closing	4.45 pm to 5.00 pm	Cindy Wong	Closing Remarks
		End of Day		

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