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Private Wealth Planning for business families and high net worth individuals

Trends, challenges and strategies

Thursday, 14 December 2017
3.00 p.m. - 5.00 p.m.

Deloitte Tax Services Sdn. Bhd.
The Springboard
Level 12B Hunza Tower
163E Jalan Kelawei
10250 Penang

Overview

Introduction

Whether you are a powerful tycoon, a serial entrepreneur or a family business owner, managing your family legacy and the transfer of wealth to the next generation is highly important. This is because unplanned wealth transfer may lead to family feuds and rivalry resulting in the fragmentation of control over the business.

At Deloitte, our Private Wealth Services team's core competencies include providing advice to high net worth business families in planning for their wealth succession and preservation, tax structuring and estate planning.

Join us for a complimentary talk where we share the various issues surrounding wealth succession and strategies to protect and preserve your wealth over generations.

Key takeaways

- Current trends impacting high net worth individuals
  - Implications of the Common Reporting Standard (CRS) where financial information of taxpayers is automatically exchanged between participating nations
  - Inheritance Tax
- Discuss the potential issues preventing the smooth transition of wealth to the successors.
- Explore the various challenges faced by business families upon the absence of the founder or patriarch.
- Discover the strategies to preserve family business and wealth over generations.
- Understand the importance of family governance and its role in ensuring preservation of not only family wealth but also family harmony across generations.

Who should attend

Business owners, CEOs, CFOs and any discerning individuals who wish to understand how to overcome the challenges of succession planning and asset protection faced by business families.

Programme

Time	Event
3.00 p.m.	Registration and high tea
3.30 p.m.	Introduction to Private Wealth Planning **High-level overview of current trends** • CRS - How does it work? What is the impact? • Inheritance Tax **Wealth succession challenges and strategies** • Impact of unplanned wealth transfer on business families • Uses of trusts and foundations as wealth succession structures for business families **Importance of family governance frameworks** • Overview of the family governance framework to strengthen family unity and values • The roles of family constitution, family council and family office **Can you trust your trustee?** • Important factors to consider before appointing a trustee • Why start planning now?
5.00 p.m.	Coffee break and networking session
5.30 p.m.	End

Guest speaker

Brendan Moey Chee Yoong
Trust Consultant, Affin Hwang Trustee Berhad

Brendan Moey is currently a Trust Consultant at Affin Hwang Trustee Berhad. He has five years of experience in the private wealth industry, specialising in both conventional and Islamic wealth preservation and distribution. Prior to this, Brendan graduated with a Law degree and was working in an investment bank.

Deloitte speakers

Thin Siew Chi
Business Tax Executive Director

Siew Chi is an Executive Director at Deloitte Malaysia's tax practice and has more than 14 years of experience in both corporate tax compliance and tax advisory work. Her tax advisory experience includes advising on various financial and business transactions, international tax planning on cross-border transactions (inbound and outbound investments), structuring of mergers and acquisitions, group restructuring exercises and tax due diligence work. Siew Chi also leads Malaysia's tax practice in serving business owners, family groups and high net worth individuals in areas including succession planning, international tax, estate planning and wealth preservation.

Chris Foong
Private Wealth Director

Chris is a Director at Deloitte Malaysia's Private Wealth Services and has been in the estate planning industry since 2004. He is a member of the Society of Trust and Estate Practitioners and a Certified Financial Planner. His expertise is in the structuring of estate planning for various circumstances using both onshore and offshore vehicles and multigenerational wealth planning particularly for high net worth individuals and families.

Registration

When and where

Date: Thursday, 14 December 2017
Time: 3.00 p.m. – 5.00 p.m.
Venue: Deloitte Tax Services Sdn. Bhd.
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Level 12B Hunza Tower
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10250 Penang

To register/To enquire

Contact person: Ivy Tan Joo Bee / Mary
Telephone: +604 218 9888
Email: itan@deloitte.com / saruldass@deloitte.com

Registration details

- Closing date: 7 December 2017
- Seats are complimentary and confirmed on a first-come-first-served basis.

Participant 1
Name (Mr/Mrs/Ms)
Designation
Email
Mobile phone no.
Special dietary requirement, if any

Participant 2
Name (Mr/Mrs/Ms)
Designation
Email
Mobile phone no.
Special dietary requirement, if any

Participating company details
Company name and business registration number
Address
Phone no.
Fax
Contact person
Email

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