

INVITATION

Tuesday, 18 October 2016

9.00AM - 12.00PM

Taipei Marriott Hotel
Spring Summer, Level 3
No. 199 Lequn 2nd Road (intersection with Jinye 4th Road),
Zhong Shan District, Taipei 10462 Taiwan



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Global reach
Local knowledge

BUILDING LEGACIES & BUSINESS SUCCESSION: UNDERSTANDING THE FUNDAMENTALS OF HOLISTIC GLOBAL ESTATE PLANNING

Around the world, a common challenge each business family faces is the issue of succession, legacy planning and wealth preservation. A common saying goes to state that “wealth does not last through three generations”, an indication of the scale of this challenge.

Indeed, wealth planning, especially succession and legacy issues, involve sensitive and private deliberations and require careful planning. Whether it is to preserve family wealth, protect children’s interest, guarantee business succession, or to ensure confidentiality, it is fundamentally important to understand that “cookie cutter” solutions may not achieve the desired results.

Come and understand the dynamics and concerns of high net worth families, the necessity for wealth and succession planning, and the legal solutions available. The talk will explore how private foundations fundamentally differ from trusts, when to consider one over the other, and most importantly, how these solutions are unique estate planning tools facilitating succession planning across generations.

Featured Speaker

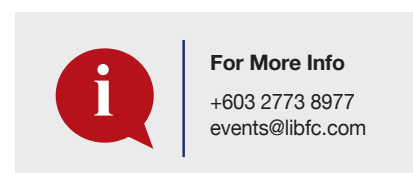


Millie Chan

Millie Chan is the Senior Consultant, Asia Pacific Market with Borden Ladner Gervais (BLG), Canada. Her main area of practice is in international wealth transfer and global estate, asset protection and capital preservation planning. Millie also works with families to establish strategies and processes to promote family governance, maintain family unity and uphold family identity and integrity. In particular, she advises high net worth families in Asia in this area of holistic global estate planning. For this purpose, she travels regularly to Asia and works in synergy with BLG’s extensive contact base of financial institutions and offshore service providers for trusts, foundations and corporations.

In addition to assisting foreign companies seeking to do business in Canada, BLG expertise has allowed BLG to help enable Canadian companies to pursue business opportunities in Asia.

[Click here to register](#)



AGENDA



International Business
and Financial Centre, Malaysia

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9.00AM Registration and Morning Coffee

9.30AM **Welcome Address**
Hui Chee Fatt, Director, Business Development, Labuan IBFC Inc.

9.45AM **Opening Remarks**
H.E. YBhg. Datuk Adeline Leong,
President, Malaysian Friendship and Trade Centre, Taipei, Taiwan

10.00AM **Holistic Global Estate Planning for High Net Worth Families**
• Characteristics and concerns of high net worth families
• Choosing the right asset protection structure
• Why the choice of jurisdiction is an important consideration

Millie Chan, Lawyer and Senior Consultant, Asia Pacific Markets, Borden Ladner Gervais

11.15AM **Panel Discussion:**
Succession, Legacy and Preservation: Challenges and Opportunities
How can families ensure their wealth passes the 3 generation test?
Are there challenges in light of stricter regulatory requirements?
Next generation : Are they so different?

Moderator

Hui Chee Fatt, Director, Business Development, Labuan IBFC Inc.

Panelists

- **Millie Chan**, Lawyer and Senior Consultant, Asia Pacific Markets, Borden Ladner Gervais
- **Angela Wu**, Managing Director, TMF Group Taiwan
- **Yap Wai Bing**, Managing Director, TMF Group Labuan

12.00PM Ends with Networking Coffee