STEP Malaysia
ADVISING FAMILIES ACROSS GENERATIONS

STEP Singapore
ADVISING FAMILIES ACROSS GENERATIONS

STEP ASEAN DIALOGUE

THE FORM AND SUBSTANCE OF WEALTH PLANNING STRUCTURES

THE TANGIBLES & INTANGIBLES

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4 MAY 2026 | MONDAY | 8AM - 3.30PM

KLGCC CONVENTION CENTRE
(FORMERLY SIME DARBY CONVENTION CENTRE)

STEP Malaysia and STEP Singapore once again collaborate to present the ASEAN Dialogue, bringing together leading practitioners from across ASEAN for a focused exchange on the evolving landscape of wealth planning.

This full-day programme explores modern wealth structures through expert-led sessions and case studies. Participants will hear from regional speakers on key tax and regulatory developments, estate planning strategies, and family governance, alongside practical insights into structuring and succession for cross-border families in an increasingly interconnected ASEAN landscape.

The dialogue will conclude with reflections from both STEP Malaysia and STEP Singapore, rounding off a day of practical insights and regional collaboration.

EARLY BIRD PRICE*

STEP Member: **RM 350**
Supporting Association Member: **RM 450**
Non-STEP Member: **RM 500**

NORMAL PRICE

STEP Member: **RM 450**
Supporting Association Member: **RM 550**
Non-STEP Member: **RM 600**

*Early bird price for tickets purchased before **27 April 2026**

Supporting Associations: FPAM, MFPC, AFA, ATCM

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AGENDA

8.00am		Breakfast and Registration
9.15am		**Welcome Remarks** Farah Deba - Branch Chair, STEP Malaysia; Partner at Wong Lu Peen & Tunku Alina
9.30am		**Panel Session 1: Private Client - Tax Development across ASEAN (Spotlight on Indonesia and Vietnam)** Speakers: Alldo Fellix Januardy, Managing Partner at AVYA Law Firm Giang Bao Chau, Tax Partner at PwC Tax and Advisory (Vietnam) Company Limited
10.15am		**Panel Session 2: Strategic Structures for Modern Estate Planning: Singapore PTC or Labuan PTC, Trust or Foundation?** Speakers: Shawn Wang, Managing Director at Lion Trust (Singapore) Ltd Chris Toh, Partner at Lee Hishammuddin Allen & Gledhill
11.00am		**Workshop Session 3: From Corporate Governance to Family Governance - A Family Case Study in Sustainable Wealth Planning. How do Families Weave from Compliance into Family Business Values?** Moderator: Lim Khan Ruey, Principal at AIA Malaysia Speakers: Aw Wen Ni, Partner at Wong Partnership Reshmi Menon, Head of Legal at Maybank Trustees Berhad
12.15pm		Networking Lunch
2.15pm		**Panel Session 4: Cross Border Family in ASEAN: Solving the Puzzle** Speakers: Yee Mei Ken, Partner at Shearn Delamore & Co Alldo Fellix Januardy, Managing Partner at AVYA Law Firm Giang Bao Chau, Tax Partner at PwC Tax and Advisory (Vietnam) Company Limited
3.20pm		**Closing Remarks** Sim Bock Eng - Chairman, STEP Singapore Branch; Partner at WongPartnership LLP
3.30pm		Event ends

Note: The organizer reserves the right to alter the event program or content at any time without giving prior notice to the participants.

About the STEP Malaysia and STEP Singapore Branch Chairs

Ms Sim Bock Eng - Chairman, STEP Singapore Branch; Partner at WongPartnership LLP

Sim Bock Eng is the Head of WongPartnership's Private Wealth Practice and a Partner in the Specialist & Private Client Disputes Practice. Her main areas are private wealth and civil litigation, including family and matrimonial law, succession, trusts and probate, banking and finance, property, and employment. She has over 20 years experience in trust, estate, and family law, both advisory and litigation, and advises ultra-high-net-worth clients on succession, estate planning, and family offices. She is Vice Chairman of the Wealth Management Institute's Global-Asia Family Office (GFO) Circle Committee and Chairman of STEP Singapore.

Ms Farah Deba - Branch Chair, STEP Malaysia; Partner at Wong Lu Peen & Tunku Alina

Farah Deba has been in legal practice for more than 30 years. Farah's special focus is in legacy planning which includes advising clients across multi generations. Farah provides a full range of trust, estate, inheritance and business succession advisory services affecting Muslims and non-Muslims with multi-jurisdictional asset base. Her range of clientele include ultra high net worth individuals, trust companies, professional will-writing companies, foundations for private and philanthropic purposes.

About the Moderator

Mr Lim Khan Ruey - Student Liaison Officer, STEP Malaysia; Principal at AIA Malaysia

Khan Ruey is the Wealth Expert at AIA Berhad, specialising in insurance solutions for high-net-worth clients. He was formerly a practising lawyer and his portfolio of advisory work include corporate banking and real estate. He holds a law degree from the London School of Economics, LLM in International Tax from King's College London, and MBA from Imperial College Business School. He was the recipient of the STEP Excellence Award 2022 for achieving top mark globally in STEP Advanced Certificate in Company Law and Practice.

About the Speakers (alphabetically by surname)

Mr Alldo Fellix Januardy, Managing Partner at AVYA Law Firm

Alldo Fellix Januardy is the Managing Partner and Co-founder of AVYA Law Firm, specializing in cross-border dispute resolution, estate planning, taxation, and asset restructuring. He holds an LLB from Universitas Indonesia and is currently an LLM candidate at Tsinghua University. His practice across Indonesia, Singapore, and China is recognized by Chambers & Partners, where he is ranked in Band 1 for Private Wealth Law - Indonesia. Beyond his legal practice, Alldo is a dedicated contributor to public discourse on law and international affairs, with his research and commentary featured in Nikkei Asia, The Straits Times, and the Lowy Institute. He also oversees AVYA's pro bono and social impact initiatives.

Ms Aw Wen Ni, Partner at WongPartnership LLP

Aw Wen Ni is a Partner in the Specialist & Private Client Disputes Practice and in the Private Wealth Practice. Wen Ni advises high-net-worth individuals and families on their diverse needs ranging from succession and estate planning across generations, asset protection, estate and trust administration. Wen Ni also regularly appears as Counsel before the Singapore Courts in high value disputes which include contested probate / estate matters, shareholders' disputes, banking and financial disputes and proceedings under the Mental Capacity Act 2008. Wen Ni graduated from the National University of Singapore and is admitted to the Singapore Bar.

About the Speakers (alphabetically by surname)

Mr Chris Toh, Partner at Lee Hishammuddin Allen & Gledhill

Chris Toh Pei Roo is a key member of both the firm's Tax, Customs & Trade Practice Group and Succession, Trusts, Estate Planning & Private Wealth Practice Group. His practice spans tax, customs, private wealth, and trusts, with clients ranging from multinational corporations and listed entities to high-net-worth individuals and charitable institutions. He holds a First-Class law degree from the University of Leeds, and an LLM in International Commercial Law from University College London and was awarded the St Philips Chambers Prize for Commercial Dispute Resolution during the Bar Professional Training Course.

Ms Giang Bao Chau, Tax Partner at PwC Tax and Advisory (Vietnam) Company Limited

Giang Bao Chau is a Tax Partner at PwC Tax and Advisory (Vietnam) with over 20 years of experience advising international and local clients on Vietnam's tax and financial regulations. She has led numerous tax health checks, compliance, and tax due diligence engagements across various sectors such as manufacturing, services, construction, energy, real estate, pharmaceuticals, and financial services. Chau has extensive experience in tax advisory, planning, business restructuring, and supporting clients through tax audits and investigations. She also advises foreign-invested companies on tax system setup and emerging tax issues, including cross-border e-commerce and digital business. Chau holds a Bachelor's degree from Foreign Trade University and is a fellow member of UK ACCA, Vietnamese CPA, certified tax practitioner, and member of the Vietnam Tax Consultants' Association.

Ms Reshmi Menon, Head of Legal at Maybank Trustees Berhad

Reshmi Menon is the Head of Legal at Maybank Trustees Berhad, where she leads and oversees the legal function supporting a wide range of trustee and fiduciary services. With over 15 years of experience spanning private legal practice and the financial services industry, she provides strategic legal advice on trust and estate planning, corporate trust structures, and securities services. Reshmi brings a practical and solutions-oriented approach to addressing complex legal issues. She holds an LLB (Hons) from the University of Aberystwyth, Wales, and has completed the Certificate in Legal Practice (CLP) in Malaysia.

Mr Shawn Wang, Managing Director at Lion Trust (Singapore) Ltd

Shawn Wang is the Managing Director of Lion Trust (Singapore) Ltd, overseeing its trust business across client services, business development, and compliance. With over a decade of experience in trust and wealth planning, he advises ultra-high-net-worth families, entrepreneurs, and family offices across Asia on cross-border fiduciary structures spanning private trusts, PTCs, and digital assets. He has held senior leadership roles in MAS-licensed trust companies, including as resident manager and board director. Prior to Lion Trust, he led the private clients team at Ocorian Singapore. Shawn is currently serving as a committee member of STEP Singapore.

Mr Yee Mei Ken, Partner at Shearn Delamore & Co

Ken is a Partner in the Dispute Resolution and Private Client & Family Business Practice Group at Shearn Delamore & Co., Malaysia, with over 25 years of experience advising private clients and families on complex disputes involving trusts, estates, and cross border wealth structures. He regularly acts for ultra high net worth and high net worth families in contentious trust and probate matters, family shareholder disputes, mental health proceeding and legacy related conflicts spanning multiple jurisdictions, particularly within ASEAN. He was called to the English Bar at Lincoln's Inn and has been a Partner since 2005, Ken serves on the firm's Management Committee and heads its China Desk, bringing a practical disputes focused perspective to legacy and succession planning.