DIGITAL ASSETS

INSURANCE & WEALTH MANAGEMENT

STEP Malaysia
ADVISING FAMILIES ACROSS GENERATIONS

Date: 18 OCT 2018 (Thursday)
Time: 2.30 pm – 5.30 pm
Venue: Sasana Kijang
2, Jalan Dato' Onn, 50480 Kuala Lumpur.

Bar Council CPD Points: 3
CPD Code: T2/10052018/STEP/KL184291/3

DIGITAL ASSETS

Traditionally, assets such as shares, properties, insurance policies and unit trusts are associated with a financial value. Digital data are everywhere and more people are having them whether they realise it or not. Digital assets are formatted in a binary source and are categorized into multimedia, cryptocurrency, text and images. Digital assets may be of financial value or emotional value.

Coverage:
- What is a digital asset?
- Types of digital assets.
- What are the inheritance issues of digital assets and suggestions to deal with the issues?

INSURANCE & WEALTH MANAGEMENT

The importance of life insurance as a key asset in estate planning cannot be overstated as it provides immediate liquidity for family members in time of need when your client is unable to do so. The payout from life insurance proceeds can provide funds to help the family maintain their lifestyle, cover education fees, pay off business debts, mortgages and other necessary expenses. When structured with the right estate planning instruments, life insurance can effectively facilitate the process of distribution and orderly transfer of wealth to the next generation and help avoid potential family disputes.

Coverage:
- Why the use of life insurance in wealth transfer planning?
- Suitability of a Universal Life policy.
- Incorporating life insurance with the right estate planning instruments.

WHO SHOULD ATTEND

- STEP members
- Lawyers / Legal advisors
- Accountants
- Tax consultants
- Trust officers
- Financial planners
- Private wealth managers
- Private bankers

In partnership with: Henley & Partners, Labuan IBFC International Business and Financial Centre, Malaysia

DIGITAL ASSETS

INSURANCE & WEALTH MANAGEMENT

Date: 18 OCT 2018 (Thursday)
Time: 2.30 pm – 5.30 pm
Venue: Sasana Kijang
2, Jalan Dato' Onn, 50480 Kuala Lumpur.

STEP Malaysia
ADVISING FAMILIES ACROSS GENERATIONS

Bar Council CPD Points: 3
CPD Code: T2/10052018/STEP/KL184291/3

TIME	EVENT
1.30 pm	**Registration**
2.30 pm	**Welcome remarks by** **FARAH DEBA SOFIAN, CHAIRPERSON, STEP MALAYSIA**
2.40 pm	**DIGITAL ASSETS AND WEALTH MANAGEMENT** by **PAUL SUBRAMANIAM**, *Chief Risk Officer and former Head of Knowledge Management and Training of ZICO Holdings Inc*
3.10 pm	**WEALTH TRANSFER PLANNING WITH LIFE INSURANCE** by **LIM CHO PENG,** *Chief Executive Officer of IPG Financial Services Pte. Ltd.*
3.40 pm	**THE RISE OF WEALTH PLANNING & FAMILY OFFICES IN ASIA – THE SINGAPORE PERSPECTIVE** by **LEE WOON SHIU,** *Managing Director, Head of Wealth Planning, Trust and Insurance of Bank of Singapore*
4.10 pm	**INSURANCE & TRUST – MALAYSIAN PRESPECTIVE** by **AZHAR ISKANDAR HEW**, *Deputy Chief Executive Officer of Rockwills Trustee Berhad*
4.40 pm	**PANELISTS DISCUSSION** • PAUL SUBRAMANIAM • LIM CHO PENG • LEE WOON SHIU • AZHAR ISKANDAR HEW
5.30 pm	**Seminar ends and networking**

In partnership with: Henley & Partners, Labuan IBFC International Business and Financial Centre, Malaysia

DIGITAL ASSETS

INSURANCE & WEALTH MANAGEMENT

SPEAKERS

TOPIC: WEALTH TRANSFER PLANNING WITH LIFE INSURANCE

SPEAKER: LIM CHO PENG, Chief Executive Officer of IPG Financial Services Pte. Ltd.

Cho Peng has more than 25 years of experience in the financial services industry with a main focus on advising High Net Worth families in Asia.

Cho Peng joined IPG in Jan 2006 as a Senior Consultant advising High Net Worth Individuals to achieve their wealth transfer planning objectives with internationally-sourced life insurance based solutions. In Jul 2011, she assumed the role of Chief Operating Officer, overseeing the daily operation of the business including working closely with the Sales Consultants to increase their referral sources and creating opportunities for new business. Cho Peng was promoted to Chief Executive Officer in Jan 2018 to further strengthen IPG's leadership position in the HNW insurance space.

Prior to IPG, she spent 13 years in Banking with her last role as a Senior Relationship Manager at an International Private Bank.

Cho Peng is a Certified Financial Planner and holds a Bachelor of Arts Degree from National University of Singapore

TOPIC: THE RISE OF WEALTH PLANNING & FAMILY OFFICES IN ASIA – THE SINGAPORE PERSPECTIVE

SPEAKER: LEE WOON SHIU, Managing Director, Head of Wealth Planning, Trust and Insurance of Bank of Singapore

He is responsible for all marketing, client development and professional training aspects of trust and estate planning services in Asia Pacific, with particular emphasis on China, Taiwan, Hong Kong & South East Asia. Advising several high net-worth families in Singapore in planning and structuring of onshore and offshore trust structures to conform with trust and estate duty legislation in Singapore, Lee also assisted in drafting trust deeds and declarations of trust for such families and in researching on the estate duty tax implications of holding assets in their personal names in Singapore, Hong Kong, Indonesia, Thailand, Philippines and Malaysia.

Lee also spearheaded and executed projects and training programs for training of new private bankers and client service officers/associates in the Asia Pacific offices with regard to sales strategy and trust administration. Lee graduated with a Bachelor of Laws (Honours) 2nd Upper Division from the University of Singapore.

TOPIC: DIGITAL ASSETS AND WEALTH MANAGEMENT

SPEAKER: PAUL SUBRAMANIAM, Chief Risk Officer and former Head of Knowledge Management and Training of ZICO Holdings Inc

He is responsible for the overall risk management and mitigation for our Group. Prior to joining ZICO Holdings Inc., Paul was the Knowledge Management & Training Partner at Zaid Ibrahim & Co. Previously, he practiced as a litigation lawyer for 22 years, being involved in several significant cases. Paul has authored several articles, including a chapter for Business Development issued by the International Bar Association in 2016. He has published practitioners' handbooks on injunctions bankruptcy and corporate insolvency and also writes for Thomson Reuters. Paul is also a much sought after panelist and has been on panels at the International Malaysian Law Conference, the Wealth Management for Managers Conference organised by the Labuan Financial Services Authority and the Knowledge Management Conference and Exhibition organised by the Central Bank of Malaysia, amongst others.

TOPIC: INSURANCE & TRUST – MALAYSIAN PRESPECTIVE

SPEAKER: AZHAR ISKANDAR HEW, Deputy Chief Executive Officer of Rockwills Trustee Berhad

He is also a Director of Rockwills Advisory Services Sdn Bhd (a licensed financial planning company by Securities Commission). He has more than 20 years' experience in estate planning and trust. Over the years he has trained more than 15,000 financial planner and intermediaries from leading financial institutions and life insurance companies. He is an estate planning facilitator for CPD/CE courses approved by Securities Industry Development Centre (SIDC), FIMM and FPAM

DIGITAL ASSETS

INSURANCE & WEALTH MANAGEMENT

Date: 18 OCT 2018 (Thursday)

Time: 2.30 pm – 5.30 pm

Venue: Sasana Kijang

2, Jalan Dato' Onn, 50480 Kuala Lumpur.

STEP Malaysia

ADVISING FAMILIES ACROSS GENERATIONS

REGISTRATION FORM

Bar Council CPD Points: 3

CPD Code: T2/10052018/STEP/KL184291/3

Please fill in ALL the details. Kindly scan and send your registration form and proof of payment to STEP MALAYSIA via email to Veronica Rayo (Veronica.Rayo@step.org) latest by **15 OCTOBER 2018, MONDAY**. *(Duplicate this Registration Form to insert additional names)*

1) Name : ____________________

Organisation : ____________________

Designation : ____________________ STEP / Bar Council Membership No: ____________

Mobile number / Direct line : ____________________

Email Address : ____________________

2) Name : ____________________

Organisation : ____________________

Designation : ____________________ STEP / Bar Council Membership No: ____________

Mobile number / Direct line : ____________________

Email Address : ____________________

3) Name : ____________________

Organisation : ____________________

Designation : ____________________ STEP / Bar Council Membership No: ____________

Mobile number / Direct line : ____________________

Email Address : ____________________

In partnership with: Henley & Partners Labuan IBFC International Business and Financial Centre, Malaysia

DIGITAL ASSETS

INSURANCE & WEALTH MANAGEMENT

Date: 18 OCT 2018 (Thursday)

Time: 2.30 pm – 5.30 pm

Venue: Sasana Kijang

2, Jalan Dato' Onn, 50480 Kuala Lumpur.

STEP Malaysia

ADVISING FAMILIES ACROSS GENERATIONS

TERMS & CONDITIONS

1) REGISTRATION & CONFIRMATION

- MUST be submitted with the completed registration form AND proof of full payment of the registration fee.
- The registration form and proof of full payment of the registration fee MUST be sent to Veronica Rayo (Veronica.Rayo@step.org) **on or before 15 OCTOBER 2018 (MONDAY) (closing date for registration)**
- Registration is on a first-come-first-served basis with full payment.
- Incomplete registration will be cancelled.

2) PAYMENT

Registration Fee

- STEP Members – RM50 per participant
- Non-Members – RM150 per participant
- Special group rate of minimum 3 participants for Non-Members only – RM120 per participant

3) PAYMENT MODE

a) Telegraphic Transfer Details / Bank Transfer

- **Account Name: PERSATUAN PENGURUS AMANAH DAN PENTADBIR ASET PUSAKA MALAYSIA (STEP)**
- **Bank Details:** CIMB Bank Berhad
- **Account No:** 800-696-7912
- **Address:** Lot 1-01, Menara Hap Seng, Jalan P. Ramlee, 50250 Kuala Lumpur
- **SWIFT code:** CIBBMYKL

b) Cheque Details

- Cheque payments should be made payable to **"PERSATUAN PENGURUS AMANAH DAN PENTADBIR ASET PUSAKA MALAYSIA (STEP)"** & arrive at our office at "c/o CIMB Trustee Services, 21st Floor, Menara CIMB, Jalan Stesen Sentral 2, KL Sentral, 50470 Kuala Lumpur" with the completed registration form on or before the closing date **15 October 2018, Monday.**

4) CANCELLATION AND SUBSTITUTION POLICY

- If the participant is unable to attend and/or is to be substituted with another participant, please notify us via email to Veronica Rayo (Veronica.Rayo@step.org) **latest by 11 October 2018, Thursday.** There shall be no refund of payment that was made if the participant is a no show.

In partnership with: Henley & Partners Labuan IBFC International Business and Financial Centre, Malaysia