Programme highlights:

- Register of beneficial ownership in onshore jurisdictions
- CRS unresolved challenges
- BEPS – Should private clients, global families and trustees be concerned?
- Doing good better through Impact Investing and Venture Philanthropy
- Trumponomics and its impact on the world and private clients: Apocalypse or a brave new world?
- Enforcement of foreign judgements at the intersection of inheritance and family law disputes
- Lasting Powers of Attorney - Cross border representation for the vulnerable client
- Rise of trust services in China
- New disclosure regime
- Are trusts still relevant to Asian families?

And much more...

DELEGATE FEE

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<tr>
<td>STEP Members</td>
<td>1,500</td>
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<tr>
<td>Non-Members</td>
<td>1,750</td>
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*The Welcome Drinks Reception is included in the delegate fee. All other social functions are charged a separate fee (please see back page for details).

KEYNOTE SPEAKERS

Foreign Policy of Singapore, a tug of war between China and the US
Ambassador Chan Heng Chee
Singapore University of Technology and Design
China going global: Is the belt and road paved with gold?
Clare Pearson
Chair, Britcham China

As well as 46 other speakers from Australia, China, Hong Kong, India, Indonesia, Malaysia, Myanmar, Singapore, Thailand, USA and the UK.

Accredited for 13.5 hours CPD – STEP, 12 Public CPD Points - SILE, 13 hours CPD – Institute of Banking & Finance Singapore
This conference is recognised under the Financial Training Scheme (FTS)
Transparency regulations, tax amnesties and changing approaches of revenue authorities around the world have weighed down the world of planning, however we are nearly there in having these issues packed down.

This popular two-day conference will address the topical issues pertinent to Asia and its families. We will have a run down on the status of implementation of regulations such as CRS and beneficial ownership registers as well as country specific sessions exploring issues and opportunities from onshore to offshore planning. With technology disruption, we will also take a peek into the digital world and how our advisory role might change in the near future.

As Asian families’ wealth expands, cross border investments and mobility of family members has become the norm. We take a deep dive into single family office and governance considerations, explore the applicability of lasting powers of attorney for cross border assets and take a look at mobility in this region with Australia and Singapore as favourite locations.

Along the same vein, our panels will discuss the relevance of trusts today, emerging markets in Asia as hotspots for business investment by Asian families and the enforcement of foreign judgement around inheritance and matrimonial issues.

With over 45 eminent speakers and experts sharing their experience and insight, this two-day conference offers you the opportunity to both hear from and network with some of the leading lights in the industry.

We look forward to seeing you there!

Seow Chee Goh TEP
Organising Chair, STEP Asia Conference
Managing Director, JPMorgan Private Bank

Register online to secure your place at www.step.org/asia2017
MONDAY 6 NOVEMBER 2017

6.30pm Welcome Cocktail Reception
Me@OUE Restaurant, 50 Collyer Quay, OUE Bayfront
Kindly supported by First Names Group

DAY 1: TUESDAY 7 NOVEMBER 2017

Morning Chair: Seow Chee Goh TEP, JP Morgan, Singapore
Afternoon Chair: Lionel Choi TEP, LGT Bank Ltd, Singapore

8.00am Registration & refreshments
Exhibits open

8.45am Welcome from STEP Singapore
Linda Wong TEP, Chair STEP Singapore

8.50am Welcome from STEP Worldwide
Patricia Wass TEP, Worldwide Chair, STEP

9.00am Keynote address: Register of beneficial ownership in onshore jurisdictions, is it relevant?
This session traces the impetus of register of beneficial ownership post the Mossack Fonseca data leak. It examines the relevance of such a register in onshore jurisdictions vs offshore jurisdictions. Such extensive cost/effort at the expense of business and in the name of transparency. Does a public register bring any value to Asia’s growing wealth? A public register in Asia countries, is it a tool for a witch hunt? Richard Hay TEP, Stikeman Elliott (London) LLP, UK
Kindly sponsored by Jersey Finance Limited

10.00am CRS unresolved challenges – a learning journey
One year on from CRS implementation from early adopters and first year implementation of late adopters, what are the lessons learnt? Is the world ready to hold hands and collect taxes effectively? This session will cover issues around privacy, prospects for amendment and links to beneficial ownership registers and special issues affecting trusts.
Filippo Nosedo TEP, Mishcon de Reya LLP, UK

10.50am Networking and refreshments

11.15am BEPS – should private clients, global families and trustees be concerned?
Over 100 countries and jurisdictions are collaborating to implement BEPS measures, including Singapore. Are Asian private clients, global families, trustees and their advisers ready for this? Our speakers will analyse the potential impact and implications, and explore possible strategies to navigate uncharted territories.
Pietro de Ridder, Mayer Brown, Singapore
Desmond Toa, Ernst & Young Solutions LLP, Singapore

11.45am Disruptor: Disruption, Disrupted
Technology evolution is a game-changer for trust business. Is the future model of trust business one of automation and Science cum Human advisory? Will artificial intelligence replace today’s trustee? Will big data impose a higher standard on decision-making? What do the millennial wealth inheritors, an informed, assertive, and highly connected breed of thinkers, demand? Moderators: Adam Clark, JP Morgan Chase, USA
Cass Goh, SilverGlobal, Malaysia
Lesly Goh, Microsoft, Singapore

12.15pm Going green: social impact investing and venture philanthropy
As impact investing moves from niche to mainstream (The Economist, Jan 2017), private investors, family offices and institutions are increasingly interested in generating positive social and environmental outcomes alongside financial returns. This session will outline different social investment approaches and practices with practical examples and provide exclusive insights into social investment opportunities.
Martina Mettgenberg-Lemière, AVPN, Singapore
Mason Tan, Garden Impact Investments Pte Ltd, Singapore

12.55pm Lunch
Kindly sponsored by WE ARE GUERNESEY

2.00pm Specialist topics

Option 1: CRS – Focus on China, Thailand and Indonesia
Moderator: George Hodgson, STEP, UK
Priyadhanao Kristanto, PB Taxand, Indonesia
Professor Kitipong Urapeepatanapong, Baker McKenzie, Thailand
Xiaogang (Steven) Wang, King & Wood Mallesons, PRC
Kindly sponsored by WE ARE GUERNESEY

Option 2: Emerging markets – Vietnam and Myanmar
Romain Caillaud, Asia Group Advisors, Singapore
Betty Gervasi, Finex Corporation, Vietnam
Kindly sponsored by INVEST SAMOA

Option 3: Data protection and solicitor client privilege
Ziva Robertson TEP, McDermott Will & Emery, UK
Rajesh Sreenivasan, Rajah & Tann, Singapore
Kindly sponsored by Hawksford

Option 4: Moving to Australia from a wealth management perspective
Sean Cortis TEP, Chapman Eastway, Australia
Dale Sanft, PwC, Australia

For further information about these specialist topics please visit www.step.org/asia2017

2.40pm Change rooms for next specialist sessions

2.45pm Specialist topics repeated – options as listed above

3.30pm Networking and refreshments

4.00pm Trumponomics and its impact on the world and private clients: Apocalypse or a brave new world?
Trump has announced that he will carry out major tax cuts and bold deregulation under his new presidential regime. Is the US heading towards becoming the new offshore tax haven of the world? Will US accept the true spirit and substance of AEOI and embrace reciprocity? What other unexpected developments and policies emanating from the US will affect the rest of the world? In this session, we compare US with the rest of the world and the opportunities and challenges that lie ahead. Moderators: Seow Chee Goh TEP, JP Morgan, Singapore
Kurt G. Rademacher TEP, Butler Snow LLP, Singapore
Bruce Zagaris TEP, Berliner Corcoran & Rowe LLP, USA

4.35pm Enforcement of foreign judgements at the intersection of inheritance and family law disputes
In today’s world of heightened mobility, more matrimonial dissolutions are occurring across borders. What are the key contentious issues and conflict of law considerations in such cross-border divorces? A close look at how and why some attacks on trusts are successful while others fail and the implications for trust structuring and planning. Moderators: Paul Stibbard TEP, Rothschild Trust, UK
Sim Bock Eng TEP, WongPartnership LLP, Singapore
Simon Bruce, Farrer & Co, UK
Marcus Dearle, Hailey Ho & Partners in Association with Berwin Leighton Paisner, Hong Kong
James Price, Stewarts Law LLP, UK

5.15pm Day 1 Close

6.15pm Drinks Reception and Dinner
The Clifford Pier at the Fullerton Bay Hotel, 80 Collyer Quay
Kindly supported by Bermuda Business Development Agency
### DAY 2: 8 NOVEMBER 2017

**Morning Chair:** Linda Wong TEP, Chair STEP Singapore  
**Afternoon Chair:** EeLin Chan TEP, Wealth Management Institute, Singapore

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Speaker(s)</th>
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<tr>
<td>8.00am</td>
<td>Welcome refreshments</td>
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<tr>
<td>8.10am</td>
<td>Breakfast briefing by WE ARE GUERNSEY: Charity and philanthropy – the art of giving</td>
<td>Kerrie Le Tissier, Collas Crill LLP, Guernsey</td>
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<tr>
<td>8.50am</td>
<td>Welcome from Chair</td>
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<tr>
<td>9.00am</td>
<td><strong>Keynote address:</strong> China going global: Is the belt and road paved with gold?</td>
<td>Clare Pearson, Chair, Britcham China</td>
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<td>9.30am</td>
<td>Family Offices in the larger context of wealth structuring</td>
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<td>10.00am</td>
<td>In recent times, we have seen the growing number of trust companies providing offshore trust for Chinese families. What are the opportunities and challenges for wealth management? This session will cover developments in PRC and the eco system covering the PRC market, the challenges faced by PRC trust companies and how they collaborate with offshore providers.</td>
<td>Jason Collins, Pinsent Masons LLP, UK</td>
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<td>10.40am</td>
<td>Networking and refreshments</td>
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<tr>
<td>11.00am</td>
<td>Rise of trust services in China</td>
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<tr>
<td>11.35am</td>
<td>Facilitation of tax crime – are the laws too harsh for professionals?</td>
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<td>12.10pm</td>
<td>Lasting Powers of Attorney: can I use mine abroad? Cross border representation for the vulnerable client. The increasing internationalisation of wealth, families and living arrangements especially for older clients is matched with the distressing increase in dementia in elderly people. What are the best options to go for when planning in advance for future incapacity in an international context? What can be done to sort it out when you do hit a problem - and the asset owner has lost capacity?</td>
<td>Julia Abrey TEP, Withers LLP, UK</td>
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<tr>
<td>12.55pm</td>
<td>Lunch</td>
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<td>2.00pm</td>
<td>Specialist topics</td>
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<tr>
<td>Option 1:</td>
<td>Private family fund – Spotlight Singapore</td>
<td>Kim Kit OW, Bird &amp; Bird ATMD LLP, Singapore</td>
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<td>Kindly sponsored by BDO</td>
<td>Dino Tan, Economic Development Board, Singapore</td>
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<td>Option 2:</td>
<td>Conflict of multicultural &amp; inter faith marriages and the resulting inheritance issues</td>
<td>Farah Deba TEP, Messrs Wong Lu Peen &amp; Tunku Alina, Advocates &amp; Solicitors, Malaysia</td>
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<td>Option 3:</td>
<td>Opportunities post amnesty</td>
<td>Prijohandjo Kristanto, PB Taxand, Indonesia</td>
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<td>Kindly supported by International Planning Group</td>
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<td>Option 4:</td>
<td>Thailand - Jurisdiction update</td>
<td>Professor Kitipong Urapeepatanapong, Baker McKenzie, Thailand</td>
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<td>For further information about these specialist topics please visit <a href="http://www.step.org/asia2017">www.step.org/asia2017</a></td>
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<tr>
<td>3.30pm</td>
<td>Networking and refreshments</td>
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<td>4.00pm</td>
<td>How relevant and vital is family governance for family enterprises and wealthy families without family-run businesses? With the noise around world politics, tax amnesties and CRS, is family governance just a trend or is there real substance to it? When is it just a nice-to-have versus when it becomes crucial to wealth-owning families? How should family governance interact with family trusts, family business holding companies, and family offices (single or multi-family offices) and the relevant implications for the planning of such structures for wealthy families.</td>
<td>Professor Joseph P. H. Fan, The Chinese University of Hong Kong</td>
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<td>4.35pm</td>
<td>Are trusts still relevant to Asian families?</td>
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<td>5.30pm</td>
<td>Final remarks and close</td>
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<td>6.00pm</td>
<td>Farewell Cocktails and Canapés</td>
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Last years’ conference sold out, so book early to secure your place!

Network with 400+ leading private client practitioners

The STEP Asia Conference attracts delegates from all over the world; in 2016 the two-day event attracted practitioners from 32 countries worldwide. As well as a topical programme to support your business needs this conference offers exceptional networking opportunities with your peers.

Last year’s attendees included representatives from the following firms:


Previous attendees said:
“Excellent conference, with exceptional thought-provoking speakers”
“A very solid program, with enormous networking capability”
“Very useful connectivity entwined with solid educational aspects”

Networking functions include:

• Welcome Cocktail Reception
  6 November 2017, Me@OUE Restaurant

• Drinks Reception and Dinner
  7 November 2017, The Clifford Pier at the Fullerton Bay Hotel

• Farewell Cocktails and Canapés
  8 November 2017, Adrift Bar at the Marina Bay Sands

Register online at www.step.org/asia2017

CPD ACCREDITATION

SILE
12 Public CPD Points
Practice Area: Private Client
Training Level: General

Attendance Policy
Participants who wish to claim CPD Points must comply strictly with the Attendance Policy set out in the CPD Guidelines. Participants are reminded to sign in on arrival and sign out at the conclusion of each day of the event in the manner required by the organiser. Participants must not be absent for each day of the event for more than 15 minutes. Participants who attend Day 1 and comply strictly with the Attendance Policy on that day may claim 6 Public CPD Points. Participants who attend Day 2 and comply strictly with the Attendance Policy on that day may claim 6 Public CPD Points. Participants who do not comply with the Attendance Policy will not be able to obtain CPD Points. Please refer to www.sileCPDcentre.sg for more information.

Institute of Banking & Finance Singapore
13 hours CPD

FTS-Eligible:
This programme is recognised under the Financial Training Scheme (FTS) and is eligible for FTS claims subject to all eligibility criteria being met. Please note that in no way does this represent an endorsement of the quality of the training provider and programme. Participants are advised to assess the suitability of the programme and its relevance to participants’ business activities or job roles. The FTS is available to eligible entities based on the prevalent funding eligibility, quantum and caps. FTS claims may only be made for recognised programmes with specified validity period. Please refer to www.ibf.org.sg for more information.

Other CPD Accreditation
This event will count towards an attendee’s CPD requirement to their professional association. For those needing to measure CPD in hours, this event would qualify as 13.5 hours of CPD.
Networking Social Events:

Welcome Cocktail Reception at Me@OUE Restaurant
Kindly supported by First Names Group
Me@OUE restaurant and rooftop lounge features floor-to-ceiling glass windows and one of Singapore’s best rooftop lounges with sweeping views of the City’s ever-evolving financial centre. Enjoy cocktails and canapés alongside your fellow delegates whilst looking out over the iconic Marina Bay prior to the opening of the 2017 Asia Conference.

The Welcome Cocktail Reception is included in your delegate rate.
You can bring along a guest for SGD 215

Drinks Reception and Dinner at the Clifford Pier
Kindly supported by Bermuda Business Development Agency
The Clifford Pier at The Fullerton Bay Hotel preserves the pier’s hawker culture while honouring its historical role as the landing point of Singapore’s forefathers. Wind down with fellow delegates over drinks and dinner after the opening day of the Conference and enjoy some of the best cuisine the City has to offer.

Fee: SGD 320

Farewell Cocktails and Canapés at Adrift
The Conference will close with farewell cocktails and canapés in the unique concept bar Adrift at the Marina Bay Sands, a quirky yet intimate space that evokes the nostalgic spirit of Silk Road trade routes and expeditions. A perfect way to relax after a busy two days of learning and networking.

Fee: SGD 215

ABOUT STEP
STEP is the global professional association for practitioners who specialise in family inheritance and succession planning. We work to improve public understanding of the issues families face in this area and promote education and high professional standards among our members. STEP members help families plan for their futures, from drafting a will to advising on issues concerning international families, protection of the vulnerable, family businesses and philanthropic giving. Full STEP members, known as TEPs, are internationally recognised as experts in their field, with proven qualifications and experience.

For any queries please contact the conference team on +44 (0)20 7340 0500 or email conferences@step.org

STEP CERTIFICATE IN INTERNATIONAL TRUST MANAGEMENT
The STEP Certificate in International Trust Management offers a solid grounding in international trust practice from a global and local perspective and offers an excellent introduction to the STEP Diploma in International Trust Management; considered the benchmark qualification for trust professionals worldwide.

Enrol before:
8 December 2017, Hong Kong
Visit www.step.org/itm-course for further information and course dates in other jurisdictions.

Register online to secure your place at www.step.org/asia2017