

The 2nd Annual Conference

South East Asia Family Wealth Management

April 28, 29 & 30 2008 – Shangri La Hotel – Singapore
Pre-Conference Family Investment Workshop April 28 Afternoon



PRE-CONFERENCE
FAMILY INVESTMENT &
PHILANTHROPY WORKSHOP
April 28 Afternoon 2pm – 5pm

1) Structuring Family Wealth into Asset Allocation & Value Investing

- Capturing emerging growth areas for investment
- Ensuring global diversification
- Applying the principles of value investing effectively

2) New Patterns of Giving in Asia

- The effects of new wealth on giving
- Impact on intergenerational wealth transfer
- Exploring best practices and best approach to philanthropy and capacity-building

Main Conference - First Day

Robert Bernstein
Managing Partner
PRISM FAMILY OFFICE, Chicago

Geoffrey Wong, CFA
Managing Director
Head Global Emerging Markets
Equities
UBS GLOBAL ASSET
MANAGEMENT, Singapore

Dr Michael Liffman
Founding Director
Asia Pacific Centre for
Philanthropy Investment
SWINBURNE UNIVERSITY
Melbourne

James J Liu
Founder & MD
OAKS FAMILY OFFICE, Singapore

Teo Pok Zin
Managing Director
HONG THYE Holdings Pte Ltd,
Singapore

Dr. Annie Koh, PhD
Associate Professor of Finance &
Dean, Office of Executive and
Professional Education
SMU, Singapore

Miles Ashton
Executive Director
Head of Public Distribution, Asia
Private Investor Products,
ABN AMRO Bank N.V., Singapore

Caroline Butler
Director
LORD NORTH STREET PRIVATE
INVESTMENT OFFICE Ltd, London

William Ng
Head of Portfolio Management
J.H. WHITNEY INVESTMENT
MANAGEMENT ASIA, Singapore

Dr. Giampaolo Parigi, Ph.D.
President
PARIGI GROUP, Milan

Doug Barnett
Managing Director
QUEST MANAGEMENT, Bangkok

Yunghun Kim
Family Member
Founders' Grand Son
LG SAMSUNG

Troy Stremler
Managing Director
NEWDEA, Englewood, USA

Chandran Nair
Founder & Chief Executive Officer
GLOBAL INSTITUTE FOR
TOMORROW, Shanghai

Main Conference - Second Day

Odd Haavik
Partner
CHARLES MONAT ASSOCIATES
Pte Ltd, Singapore

Tom Handler
Partner
HANDLER, THAYER & DUGGAN,
Chicago

Christian Stewart
Managing Director
Head of Wealth Advisory in Asia
JP MORGAN, Hong Kong

Mag. Erich Baier, LL.M.
Certified Public Tax Advisor
BILANZ DATA GmbH, Vienna

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INVESTMENT
MANAGEMENT
REVIEW

SOUTH EAST ASIA FAMILY WEALTH MANAGEMENT



Dear Executive,

Asian family businesses are moving to the next generation and if the business is in fact part of the day - to - day living of the family; there is a growing need to formalize family business governance as both the business and the family grow.

In Europe and US, family offices have emerged as the structure of choice to ensure inter-generational wealth transfer and family governance whether the family still owns the business created by the founder or merely manage the wealth created by the proceeds of the sale of the business.

In Latin America what comes first is the family over the business but when asked; succession is the more important factor that worries Latin American families over the future and therefore avoiding dealing with taboo topics for the sake of the family unity does not help the future of both the family and its business.

What keeps Asian families awake at night? Are Asian families ready for family offices? These fundamental questions will be addressed through a panel session organised and moderated by Prof. Dr. Annie Koh, a researcher and practitioner in the field of family offices in Asia who will share her findings live with Asian family members.

Family-controlled companies do outperform by far their public counterparts as successful families in business have understood, recognised and enhanced the role of family values and value investing. Panel sessions will also derive lessons learnt by Asian families towards family business commitment, growth and continuity and highlight the success factors that allow family members energy the family business noticeably through educational case-studies.

Legacy planning and philanthropy will be discussed from a strategic standpoint to combine both effectiveness and efficiency to keep the family together whilst achieving the goals set.

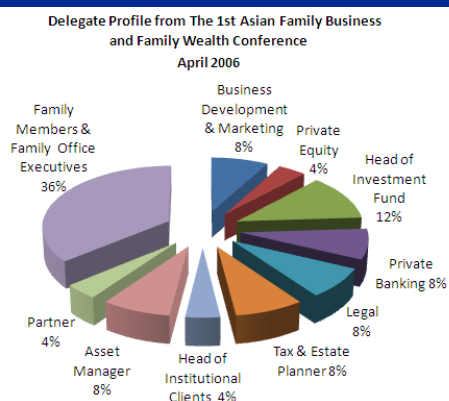
Growing as well as keeping control and protecting the family assets including the financial wealth are multiple issues that Asian owners of substantial wealth need to sort out, address and master in a proper manner.

The conference will provide a proactive and educational framework to help families take the right perspective for them and set-up their goals and objectives for the future.

We look forward to welcome you in Singapore next April 29 & 30, 2008

François Golbery
Chairman ESAFON
Chief Executive Officer
MGI SA, Geneva

Delegate Profile from The 1st Asian Family Business and Family Wealth Conference



Pre-Conference Family Investment & Philanthropy Workshop - April 28, 2008

Afternoon 2pm - 5pm

1. Structuring Family Wealth into Asset Allocation & Value Investing
 - Capturing emerging growth areas for investment
 - Ensuring global diversification
 - Applying the principles of value investing effectively

Robert Bernstein &
Managing Partner
PRISM FAMILY OFFICE, Chicago

Geoffrey Wong, CFA
Managing Director
Head Global Emerging Markets Equities
UBS GLOBAL ASSET MANAGEMENT, Singapore

Geoffrey Wong heads the equity investment team responsible for global emerging markets, and the Asia (ex-Japan) region at UBS Global Asset Management. He manages a team of analysts researching companies, industries and countries globally. His prior experience includes co-founding an Asian investment management firm, where he served as Director of Investment Management responsible for asset allocation and stock selection for global and regional institutional portfolios. He has extensive experience that combines fundamental and quantitative techniques in the Asian markets. Geoffrey served on the board of directors of Singapore Exchange, the combined stock and futures exchange of Singapore, and is a member of the Singapore Society of Financial Analysts.

2. New Patterns of Giving in Asia

- The effects of new wealth on giving
- Impact on intergenerational wealth transfer
- Exploring best practices and best approach to philanthropy and capacity-building

Dr Michael Liffman
Founding Director
Asia Pacific Centre for Philanthropy Investment
SWINBURNE UNIVERSITY, Melbourne

Michael has a background in social policy and research, community work, and philanthropy, and was CEO of one of Australia's leading private foundations, The Myer Foundation, and President of the Australian Association of Philanthropy. He was a member of the International Network on Strategic Philanthropy. His publications include A Tradition of Giving: Seventy-five Years of Myer Family Philanthropy, (Melbourne University Publishing, 2004).

Main Conference - First Day April 29, 2008

- 08.00 Welcome Coffee and Registration
09.00 Opening Remarks by François Golbery, Chairman ESAFON & the Chairman

Robert Bernstein
Managing Partner
PRISM FAMILY OFFICE, Chicago

Robert is the founder and CEO of Prism, his personal family office and a Managing Member of Heller Bernstein & Associates, a transatlantic partnership which architects and develops specialized investments and structured products for family offices and institutions through a global collaboration with world renowned investment, risk management and structured finance specialists.

STRUCTURING ISSUES TO THE MANAGEMENT OF FAMILY INVESTMENT & WEALTH IN ASIA

09.15 Major Investment and Family Dynamics Issues to Consider in Developing a Thriving Family Office

Robert Bernstein
Managing Partner
PRISM FAMILY OFFICE, Chicago

10.00-12.00 Panel Session

Are Asian Families Ready for Family Offices?

The families will highlight the key issues that keep them awake at night and identify how and what to do about it? Then the family office concept will be put in perspective and pros and cons will be identified from an Asian culture

Participants:

Teo Pok Zin
Managing Director
HONG THYE Holdings Pte Ltd, Singapore

Teo Pok Zin is a graduate in chemical engineering and has been with the family business until the company became a family investment holding company with the sale of its manufacturing operation originally started off as a commodity trading company (mainly tea) and subsequently diversified into manufacturing (MSG).

James J Liu
Founder & MD
OAKS FAMILY OFFICE, Singapore

James J Liu is an MBA graduate from the University of Chicago and has completed AMP at Harvard Business School. Prior to the set-up of its own family office, James J Liu served in key senior positions within the banking industry around the world.

(Other Family Offices to be shortly confirmed)

Moderator:

Dr. Annie Koh, PhD,
Associate Professor of Finance & Dean,
Office of Executive & Professional Education
SMU, Singapore

Annie holds a PhD in International Finance from New York University and has extensive experience in consulting and executive teaching. She is involved in the research and survey in the field of family offices in Asia. She is also concurrently the Associate Dean of the Lee Kong Chian School of Business and Academic Director of the International Trading Institute@SMU. She sits on several boards as well.

Managing and Protecting Financial Wealth

12.00 How to Access Local or Exotic Markets and Hot Investment Themes across all Asset Classes in a Transparent, Liquid, Efficient and Flexible Manner?

- What types of structured products linked to these markets and themes are appropriate from a risk profile view"?

Miles Ashton
Executive Director
Head of Public Distribution, Asia
Private Investor Products,
ABN AMRO Bank N.V., Singapore

Miles Ashton is currently the Head of Public Distribution, Private Investor Products for ABN AMRO in Asia. Covering markets in Hong Kong, China, India, Taiwan, Korea, Singapore, Indonesia and Malaysia, his team has a multi-asset mandate for developing and marketing structured products targeted at private investors, private and retail banks.

Miles has over 10 years' experience in the derivatives space and has worked in Australia and London before taking up his current position in Hong Kong.

12.45 Lunch hosted by ABN AMRO

TOWARDS MORE SOPHISTICATED PORTFOLIOS

2.00 The Evolution of Asset Allocation in the Western World: Why and how families do decide to move towards more sophisticated portfolios

- Determinants of asset allocation
- Testing
- Why does asset allocation matter?
- How families develop their asset allocation strategies?

Caroline Butler
Director
LORD NORTH STREET PRIVATE INVESTMENT
OFFICE Ltd, London

2.45 The Prerequisite to the Construction of an Asian Alternative Portfolio

- Capitalising on emerging Asian private enterprises as a solid base for investment
- Identifying talented managers
- Pros and cons of direct investment

William Ng
Head of Portfolio Management
J.H. WHITNEY INVESTMENT MANAGEMENT
ASIA, Singapore

3.30 Coffee break

FAMILY BUSINESS VALUES

- 4.00 Innovative Wealth Management Strategies for Entrepreneurial Families
Dr. Giampaolo Parigi, Ph.D.
President
PARIGI GROUP, Milan
The Parigi family has a 600-year long tradition in merchant banking and its family office applies know-how and capital to build private equity funds from scratch and craft deals after a rigorous and consensual validation of the underlying industrial base assets. The presentation will highlight the process and its approach of private equity from a different angle
- 4.30 Turning Asian Family – Owned Businesses into Global Competitors
Doug Barnett
Managing Director
QUEST MANAGEMENT, Bangkok
- 5.00 Philanthropy Panel Session: Why Philanthropy is so Important?
Yunghun Kim
Family Member
Founders' Grand Son
LG SAMSUNG
Troy Stremmler
Managing Director
NEWDEA, Englewood, USA
Robert Bernstein
Managing Partner
PRISM FAMILY OFFICE, Chicago
- 5.45 Beyond Philanthropy - Key Challenges for Asian Business Owners!
Chandran Nair
Founder & Chief Executive Officer
GLOBAL INSTITUTE FOR TOMORROW, Shanghai
- 6.15 Close of Day One
- 6.30 Cocktail hosted by



**Main Conference - Second Day
April 30, 2008**

- 08.30 Welcome Coffee and Registration
- 08.45 Opening Remarks by the Chairman
- PLANNING FOR SUCCESSION IN ASIAN BUSINESSES
- 09.00 Generational Asset Transfer: How and when to provide liquidity to transfer wealth?
 - Inheritance and capital gains tax issues
 - Family business continuity & succession
 - International high –net worth life insurance Case studies
 - All out to sea
 - Buy –sell success
 Odd Haavik
Partner
CHARLES MONAT ASSOCIATES Pte Ltd, Singapore
- KEEPING CONTROL OVER THE ASSETS
- 09.45 Asset Protection Trust & Family Office Captives: Controlling investment & risks under the same Roof
Tom Handler
Partner
HANDLER, THAYER & DUGGAN, Chicago
- 10.30 Coffee Break
- 11.00 The Concept of a Private Trust Company: What is a PTC used for? What are the benefits? Where to locate your PTC?
 - The PTC Structure: Control without ownership?
 - Compulsory family succession planning
 - The PTC as the seat for the "Family Council"
 - The PTC to house the "Family Office"
 - The Asian Dilemma: How do you get professional support?
 - Rent or buy?
 Christian Stewart
Managing Director
Head of Wealth Advisory in Asia
JP MORGAN, Hong Kong
- 11.45 Tax Planning in an International Scale for Cross – Border Holdings
Mag. Erich Baier, LL.M.
Certified Public Tax Advisor
BILANZ DATA Gmbh, Vienna
- 12.30 Closing Remarks by the Chairman
- 12.45 Close of the Conference
- 13.00 Buffet Lunch hosted by



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How to register

By Phone : + 41 22 319 69 00
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By Mail : MGI (SUISSE) SA
4, Bld James Fazy - CH-1201 Genève - Suisse
By Internet : www.mgi-direct.com
By E-mail : customer.service@mgi-direct.ch

Date and venue

Workshop and
Main Conference:
April 28, 29 & 30, 2008 (C0811)
Shangri-La Hotel, Singapore



Address: Orange Grove Road
Singapore, Singapore

Accommodation

As a MGI Participant, you and your spouse benefit from special rates for your room at the Shangri-La Hotel, Singapore.
Please call our Registration Desk at + 41 22 319 69 00 in order to book your room as soon as possible to avoid disagreement.

Fee

The fee for the conference including refreshments, luncheon, cocktail, and a CD-ROM of the presentations is:
Main Conference & Workshop: US\$ 3'350, CHF3'550, Euro 2'150 (+ VAT) (code C0811)
- A 15% discount (not cumulative with other discounts) is granted for any early registration and payment before February 29, 2008
- A discount of 30% is granted to the second and any additional registration from the same institution at the same address
- A discount of 25% is granted for MGI Club Members

Special fee for Family Members, Family Businesses, Private Investors and Single Family Offices: Euros 1'500; CHF 2'550; US\$ 2'400 (+VAT)

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To receive full details, please send an email to Anne Golbery at agolbery@mgi-direct.ch

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Cancellation up to one month by writing before the conference will support an administrative charge of 10% of the fee. Prior to the one month the full fee is due but a substitute delegate may attend in your place if required.

MGI Commitment

This programme has been specially designed in compliance with the quality criteria set by MGI. The topics covered are issued from our research and the panel of speakers has been carefully selected on the basis of their credentials and relevant experience. Therefore, this programme is the sole property of MGI SA and cannot be copied under any circumstances.

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Yes, I wish to register to "The 2nd Annual South East Asia Family Wealth" Conference (C0811) on April 28, 29 & 30, 2008

Yes, I am a Family Member, Family Business, Private Investor or Single Family Office and I wish to register to "The 2nd Annual South East Asia Family Wealth" Conference on April 28, 29 & 30, 2008 (C0811)

Yes, I wish to subscribe to the INVESTMENT MANAGEMENT REVIEW

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