



a marcusevans event



private wealth management  
APAC SUMMIT

## Private Wealth Management APAC Summit 2015

2-4 November 2015 | Hilton Kuala Lumpur Hotel | Kuala Lumpur | Malaysia | [www.pwmsummit.com](http://www.pwmsummit.com)

monday 2 november	
10:00-12:00	Event Registration [Lake Garden Foyer]
12:00-13:00	Welcome Lunch [Grand Ballroom A]
13:00-13:15	<b>marcus evans</b> Welcome Address [Grand Ballroom B] <b>Erika Emil Rinaldi</b> , Executive Producer, <b>marcus evans</b>
	Chairman's Opening Address [Grand Ballroom B] <b>Todd Benjamin</b> , Former Financial Editor, <b>CNN International</b>
13:15-14:00	Opening Keynote Presentation [Grand Ballroom B] <b>The Family Office CIO Perspective on Impact and Sustainable Investing</b> <b>Carol Pepper</b> , CEO & Founder, <b>Pepper International</b>
14:00-14:45	Keynote Presentation [Grand Ballroom B] <b>Winning the Family Wealth Game to Create a Lasting Dynasty</b> <b>Francesco Lombardo</b> , MD, <b>Veritage Family Office</b>
14:45-15:15	Networking Coffee Break [Lake Garden Foyer] Sponsor Briefing [Accord]
15:15-17:15	One-to-One Meetings [Grand Ballroom C]
17:15-18:00	Presentation [Grand Ballroom B] <b>Building Private Equity Portfolios in Good Times and Bad</b> <b>Gerald Goh</b> , Senior Investment Director, <b>Cambridge Associates</b>
18:00-18:45	Parallel Sessions: Please Choose
Option A	Presentation [Grand Ballroom B] <b>Delving Deep into the Heart and Mind of China's Private Wealth Community to Develop Trusting Relationships</b> <b>Jacky Jiang</b> , MD, <b>Hefeng Family Office</b>
Option B	Presentation [Accord] <b>Charity Cannot Solve Poverty: Establishing Social Entrepreneurship as a Sustainable Investment Asset</b> <b>Kevin Moon</b> , Project Manager, <b>BoP HUB</b>
18:45-19:45	Family Office Collaboration Forum [Grand Ballroom B] <b>Family Office Synergy: Establishing an Effective Collaboration Framework among Family Offices to Increase Capital, Mitigate Risk and Seize Cross-Border Opportunities</b> <b>Francesco Lombardo</b> , MD, <b>Veritage Family Office</b> <b>Carol Pepper</b> , CEO & Founder, <b>Pepper International</b> <b>Andrew White</b> , CFA, Portfolio Manager, <b>Sandaire Family Investment Office</b>
19:45-20:15	Welcome Reception [Lake Garden Foyer]
20:15	Welcome Dinner [Grand Ballroom A]



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tuesday 3 november	
07:30-09:00	Breakfast [Vasco's]
09:00-09:45	Keynote Presentation [Grand Ballroom B] <b>Finding Balance: Striking a Balance between Investment and Philanthropy</b> <b>David Werdiger</b> , Second Generation Family Member, Technology Entrepreneur, Community Activist
09:45-10:45	Family Dynamics Forum [Grand Ballroom B] <b>Exploring the Wisdom of Communication in Preserving Multigenerational Wealth</b> <b>Professor Joseph Fan</b> , Professor School of Accountancy & Department of Finance, <b>Chinese University of Hong Kong (CUHK)</b> & Director, <b>Institute of Economics and Finance</b> <b>Rafiq Jumabhoy</b> , Executive Chairman, <b>Orkney Investments</b> <b>Francesco Lombardo</b> , MD, <b>Veritage Family Office</b> <b>Ian Marsh</b> , Founder & MD, <b>familydr</b> <b>Corentin Billiet</b> , Client Relationship Manager APAC, <b>Trusted Family</b>
10:45-11:00	Networking Coffee Break [Lake Garden Foyer]
11:00-13:00	One-to-One Meetings [Grand Ballroom C]
13:00-14:00	Lunch [Grand Ballroom A]
14:00-14:45	Presentation [Grand Ballroom B] <b>Building a Secure Future: Drawing the Map to Sustain Family Business across Generations</b> <b>Professor Joseph Fan</b> , Professor School of Accountancy & Department of Finance, <b>Chinese University Hong Kong (CUHK)</b> , Director, <b>Institute of Economics and Finance</b> , & Co-author of <b>The Family Business Map</b>
14:45-15:30	Roundtable Discussion [Accord] <b>Delivering the Future: Providing for Family Succession and Ongoing Control to Embody the Family Mission and Values</b> <b>Mark Lea</b> , MD, <b>Lea &amp; White International Advisers</b>
15:30-15:45	Networking Coffee Break [Lake Garden Foyer]
15:45-17:45	One-to-One Meetings [Grand Ballroom C]
17:45-18:45	Wealth Creators/Keepers Forum [Grand Ballroom B] <b>Recognising the Wildest Dreams and Deepest Desires of Wealth Creators and Keepers to Formulate Asset Allocation Strategies</b> <b>Jack Hon</b> , Director, <b>Wide Growth</b> <b>Datuk Vinod Sekhar</b> , Chairman & CEO, <b>Petra Group &amp; Green Rubber Global</b> <b>David Werdiger</b> , Second Generation Family Member, Technology Entrepreneur, Community Activist
18:45-19:30	Presentation [Grand Ballroom B] <b>Discovering the True Meaning of Wealth, Prosperity and Well-Being</b> <b>Datuk Vinod Sekhar</b> , Chairman & CEO, <b>Petra Group &amp; Green Rubber Global</b>
19:30	Evening Reception – Join us for a cocktail reception to maximise informal networking opportunities! [Grand Suite on Level 7]



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### wednesday 4 november

07:30-09:00	Breakfast and hotel check-out [Vasco's]
09:00-09:45	Presentation [Grand Ballroom B] <b>Passing on the Baton: Managing Family Business Succession</b> <b>Rafiq Jumabhoy</b> , Executive Chairman, <b>Orkney Investments</b>
09:45-10:30	Presentation [Grand Ballroom B] <b>Security and Cryptocurrency: Forecasting the Future of Privacy for Private Investors</b> <b>Bill Majcher</b> , International Family Office Advisor, Global Money Laundering & Financial Crimes Advisor
10:30-10:45	Networking Coffee Break [Lake Garden Foyer]
10:45-12:15	One-to-One Meetings [Grand Ballroom C]
12:15-13:00	Closing Presentation [Grand Ballroom B] <b>Building Effective Family Cohesion through Communication to Create Greater Value in the Family Business</b> <b>Joachim Vandaele</b> , CEO, <b>Trusted Family</b> <b>Corentin Billiet</b> , Client Relationship Manager APAC, <b>Trusted Family</b>
13:00-13:15	Chairman's Closing Comments [Grand Ballroom B] <b>Todd Benjamin</b> , Former Financial Editor, <b>CNN International</b>
	Prize Draw – Hand in your evaluation form to qualify!
13:15-14:15	Closing Lunch [Grand Ballroom A]