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Network, relax and do business during buffet style lunches and cocktail reception.

11 - 13 July 2005 - The Grand Hyatt, Singapore



## High Net Wealth Management

### Key Speakers



**Alison Lim**  
Deputy Director, Head of  
Investor Services Division  
**Monetary Authority of  
Singapore**



**Albert Lee**  
Head of Global Private Client,  
Asia Pacific Region  
**Merrill Lynch, Hong Kong**



**Kam Shing Kwang**  
Managing Director and Head  
of Investments South Asia  
**JP Morgan, Singapore**



**Graham Reeve**  
Managing Director  
**Myer Family Office,  
Australia**



**Arpit Agarwal**  
Head of Private Banking  
**ICICI Bank, India**



**Stephen Pak**  
Chief Investment Officer -  
Asia  
**CSFB Private Bank, Hong  
Kong**



**Alain Mestat**  
President of the Promotion  
Board  
**Luxembourg Financial  
Centre**



**Carol Pepper**  
President  
**Pepper International  
Family Office, USA**



**Rajesh Malkani**  
Managing Director  
**BNP Paribas, Singapore**

- Delivering successful strategies for building your HNW client's wealth
- Learn and compare best practices for winning and retaining clients in an increasingly competitive environment
- Balancing risk and return in your client's portfolio in an uncertain investment market
- Integrating alternative products into your HNW's investment strategy

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# Capitalise on Asia's booming HNW market

**Peoples' wealth is booming. Over the last year the number of Asian households with at least US\$100,000 in financial asset under management grew by 10%.**



**Networking**



**Knowledge**



**Sharing**



**New connections**

However, as peoples' wealth is increasing so are their investment demands.

No longer satisfied with pensions or bank accounts that offer minimal growth, they are looking at more complex products. Funds, hedge funds, real estate, art, private equity, distressed assets – private investors want a wider choice of where to invest their money.

But how do you weigh up the different investment options? What are their tax implications? How do you achieve the delicate balancing act of maximizing your client's annual returns whilst balancing exposure with risk? And perhaps most importantly, how do you retain and gain clients rather than losing them in an increasingly competitive market.

**Private Banking Asia 2005** explores the size and scope of opportunities on offer in the HNW marketplace. For both new and experienced wealth management investors and practitioners, **Private Banking Asia 2005** offers

the latest strategies on how to not just meet but to exceed your clients expectations.

**Private Banking Asia 2005 will provide you with:**

- An information packed 3 day event featuring over 40 experts in the Wealth Management industry
- A unique networking opportunity bringing together the providers and distributors of high yield investment alternatives to the private banking and financial planning sectors of Asia
- A B2B forum that focuses on the needs of Asia's increasingly affluent society
- An environment dedicated to the promotion of financial management industry best practice, with the sole aim of educating industry practitioners on how to build their clients wealth

**Learn from leading wealth management practitioners including:**

#### Family Offices:

- **Graham Reeve**, Managing Director, **Myer Family Office**, Australia
- **Bryan Goh**, Head of Alternative Investments, **OAKS Family Office**, Singapore
- **William Klippgen**, Director, **Tigris Capital**, Singapore
- **Suzanne Murphy**, Managing Director & Member Investment Committee, **Acorn Partners**, USA
- **Carol Pepper**, President, **Pepper International Family Office**, USA
- **Roland Staub**, President, **TS Trustee Suisse**, Switzerland

#### Private Banks:

- **Albert Lee**, Head of Global Private Client, Asia Pacific Region, **Merrill Lynch**, Hong Kong
- **Arpit Agarwal**, Head of Private Banking, **ICICI Bank**, India
- **Kam Shing Kwang**, Managing Director, Head of Investments South Asia, **JP Morgan**, Singapore
- **Stephen Pak**, Chief Investment Officer, **CSFB Private Bank**, Hong Kong
- **Herman Overdijk**, Chief Investment Officer, **Mees Pierson**, Hong Kong
- **Phick Fui Yeong**, Head of Private Banking, **DBS Private Banking**, Singapore
- **Guy Hedley**, Head of Private Banking, **Macquarie Bank**, Australia
- **Donna Nicolof**, Head of Private Banking, **National Private Bank**, Australia
- **Arpit Agarwal**, Head of Private Banking, **ICICI Bank**, India
- **Osmond Plummer**, Head of Compliance, **Bank of New York**, Switzerland
- **Rajesh Malkani**, Managing Director, **BNP Paribas**, Singapore
- **Elaine Lai**, General Manager – Wealth Management, **Standard Chartered Bank**, China
- **Sharad Nair**, Head – Investment & Privilege Banking, **Mashreqbank**, Dubai
- **Stuart Cain**, Director, **Goldman Sachs**, JB Were, Australia
- **Olaf Chalmer**, Chief Executive Officer, **CH Capital**, Luxembourg
- **Nick Kalikajaros**, Head of Private Banking, **St. George Bank**, Australia
- **Rahul Malhotra**, Global Business Manager for the NRI Business, **Citibank**, UK
- **David Y C Wong**, Region Head Private Banking, Asia Pacific **American Express Bank**, Hong Kong
- **Markus Ruffner**, Partner, **NPB Neue Private Bank**, Switzerland
- **Rajesh Malkani**, Managing Director, **BNP Paribas**, Singapore
- **Terry Ferris**, Head of Philanthropy, **Mees Pierson**, Singapore
- **Yam Ling Tan**, Head of Private Banking, **United Overseas Bank**, Singapore

#### Fund Managers and Product Managers:

- **Matt Dillon**, Regional Manager – Asia Pacific, **Man Investments**, Hong Kong
- **Sanjay Hundiwalla**, Senior Vice President - Direct Investments, **United Gulf Management**, USA
- **Mark Powers**, President, **Powers & Dubin**, USA
- **Jeng-tek Low**, Director, **Everest Capital**, Singapore
- **Christoph Rubel**, Partner, **Partners Group**, Switzerland
- **Morgan Laughlin**, Managing Director, Head of Non-Japan, Asia, **DB Real Estate**, Hong Kong
- **John B. Trammell**, Chief Executive Officer, **Investor Select Advisors**, USA
- **Laurence Laveau**, Vice President - Equity Derivatives Sales **SG Corporate & Investment Banking**, Hong Kong

#### Associations:

- **Leong Sze Hian**, Chairman, Society of Financial Service Professionals, Singapore
- **Annie Wee**, Chief Executive Officer, **Wealth Management Institute**, Singapore
- **Irene Lee**, General Manager, **Singapore Tyler Print Institute**
- **Alison Lim**, Deputy Director, Head of Investor Services Division, **Monetary Authority of Singapore**

**Who will you meet at Private Banking Asia 2005?**

- HNWs • Family Offices • Private Banks • Fund Managers
- Trustees • Wealth Management Advisors • Tax Consultants
- Regulators

**Don't miss out in 2005 – register today!**

**Register online, complete and fax back the registration form at the back of the brochure or call us at (65) 6322 2700**

**Register before 30 April 2005 to enjoy 10% off the registration fee.**

## High Net Wealth Management

**8.00 Registration, morning coffee and tea** hosted by



**8.45 Chair's welcoming remarks**



**Suzanne Murphy**

Managing Director and Member Investment Committee  
**Acorn Partners (Family Office), USA**

## ASSESSING ASIA'S HNW MARKET AND TRENDS

**Welcoming keynote address**

**8.55 Developing the wealth management industry in Singapore**



**Alison Lim**

Deputy Director, Head of Investor Services Division  
**Monetary Authority of Singapore**

**Keynote address**

**9.10 Meeting the demands of today's high net worth individual**



- Examining new investment behaviours and asset allocations of HNWs
- Assessing what are the new service demands of the HNW
- Understanding the implications for the private banking industry

**Albert Lee**

Head of Global Private Clients, Asia Pacific Region

**Merrill Lynch, Hong Kong**

*Merrill Lynch are co-authors of the World Wealth Report which looks at changing trends in the needs and demands of HNWs*

**Regional wealth management roundtable**

**9.40 Reviewing the growth and potential of the Asian HNW market**

- Analysing the similarities and differences between the Asian HNW market and the rest of the world
- What are the key investment strategies that HNWs are adopting and how have these changed?
- Where do the greatest business opportunities for private wealth management teams lie?

Panellists:



**Harmen Overdijk**

Chief Investment Officer - Asia

**Mees Pierson, Hong Kong**



**Kam Shing Kwang**

Managing Director and Head of Investment South Asia  
**JP Morgan, Singapore**



**Nick Kalikajaros**

Head of Private Banking

**St. George Bank, Australia**



**Arpit Agarwal**

Head of Private Banking

**ICICI Bank, India**



**Tan Sing Hwee**

Head of Investment Advisory Group

**ABN AMRO Private Banking, Singapore**

Moderator:

**James Anderson**

Chairman & Editor-in-Chief,

**Tru-Est**

*Tru-est produce the online portals [www.thewealthnet.com](http://www.thewealthnet.com) for the wealth management industry [www.thetrustnet.com](http://www.thetrustnet.com) for technical content, for trust specialists and [www.pamonline.com](http://www.pamonline.com) for private asset managers*

**10.30 Morning refreshments**

## WINNING AND SERVING YOUR CUSTOMER

**11.10 Balancing risk and return: Developing an effective risk management framework for portfolio management**



- Examining the main types of risk facing HNW portfolio managers
- Embedding risk management policies in the areas of strategy development and performance and pricing
- Disseminating risk management practices and methodologies to the clients

**Kam Shing Kwang**

Managing Director and Head of Investments South Asia  
**JP Morgan, Singapore**

**11.40 Evaluating the importance of brand in private banking and wealth management**



- Identifying what measures you can take if you don't have an established brand

- Analysing how best to use your brand to position yourself within the market

- Is brand only useful for targeting new clients or can it be utilized for existing clients?

**David Y. C. Wong**

Executive Director, Region Head Private Banking, Asia Pacific  
**American Express Bank, Hong Kong**

**International case study**

**12.10 Strategically differentiating yourself from your clients – If you are all selling the same product how can you strategically differentiate yourself from your competitors?**



- Where do the greatest areas of competition lie when it comes to winning and retaining HNWs?

- Evaluating what are the most successful strategies at differentiating yourself from your competitors – how price sensitive are today's investors?

- Determining what pricing strategy (i.e. transaction based, management or bundled) is most suitable for your HNW

**Alain Mestat**

Head of International Marketing & Corporate Communications  
**Banque Privée Edmond de Rothschild Europe, Luxembourg**

**12.40 Lunch**

## EVALUATING AND MEETING THE NEEDS OF TODAY'S HNW INVESTOR

**Special address**

**2.00 Evaluating the demands of today's high net worth individual**



- How have the needs and risk attitude of HNW's changed? What future trends can we expect to see?

- Examining new investment strategies that HNWs are adopting to achieve their objectives

- Putting together a checklist of what today's high new worth individuals looking for from wealth management professionals in terms of service - are they getting it?

**Carol Pepper**

President

**Pepper International Family Office, USA**

**Family office roundtable**

**2.30 What do they want from private banks?**

- Identifying family offices main wealth management concerns

- What services or advice does a family office value most from a private bank?

- Where are private banks delivering on family office demands and where are they falling short?

Panellists:



**Roland Staub**

President

**TS Trustee Suisse AG (Family Office), Switzerland**



**William Klippgen**

Director

**Tigris Capital (Family Office), Singapore**



**Bryan Goh**

Director, Alternative Investments

**Oaks Family Office, Singapore**



**Graham Reeve**

Managing Director

**Myer Family Office, Australia**

Moderator:



**Suzanne Murphy**

Managing Director and Member Investment Committee

**Acorn Partners (Family Office), USA**

**3.10**



Speed Networking is an exciting non-pressured way to meet fellow conference delegates and industry peers in one 40-minute session. These brief meetings are the starting point for conversation and networking throughout the conference. This is where long lasting and profitable business relationships begin.



- Exchange business cards with fellow conference delegates and industry peers
- The best 40 minutes networking session you have ever experienced

### 3.50 Afternoon refreshments

### POSITIONING YOURSELF AS YOUR CLIENT'S TRUSTED ADVISOR

#### Keynote case study

##### 4.20 Inside the mind of today's family office



- How does today's family office operate?
- Understanding how a family office goes about winning new clients
- Reviewing new investment strategies that family offices are adopting to achieve their clients objectives

**Roland Staub**

President

**TS Trustee Suisse AG (Family Office), Switzerland**

#### Keynote address

##### 4.50 Overcoming family offices concerns over transfer and distribution of their wealth



- Evaluating the advantages and disadvantages of the following wealth transfer options:
  - inheritance
  - trusts
  - estates
  - philanthropy
- Examining the new opportunities and challenges created by the retirement revolution
- Understanding where a private bank can work with family offices to add value in a generational planning strategy

**Graham Reeve**

Managing Director

**Myer Family Office, Australia**

*The Myer Family Office was recently voted the number 1 Australian family office in a recent Euromoney survey.*

#### Hard talk

##### 5.20 Evaluating and overcoming the key challenges facing private banks when meeting the wealth management needs of their clients

- Migrating from 'best in commission' product selling to offering 'best in class' open architectures – easier said than done?
- What criteria should private banks use when evaluating which investment products to put on their 'approved' list?
- Implementing effective internal controls that instills confidence amongst your clients and regulatory authority about the veracity of your private banking services

Panellists:



**Guy Hedley**

Head of Private Banking

**Macquarie Bank, Australia**



**Osmond Plummer**

Head of Compliance

**Bank of New York, Switzerland**



**Markus Ruffner**

Partner

**NPB Neue Private Bank, Switzerland**

**Yam Ling Tan**

Head of Private Banking

**United Overseas Bank, Singapore**

Moderator:



**Leong Sze Hian**

Chairman

**Society of Financial Services Professionals**

### 6.00 Chair's closing remarks

### 6.00 Cocktail Reception



### 8.00 Morning coffee and tea

### 8.50 Chair's welcoming remarks



**Alain Mestat**

President of the Promotion Board

**Luxembourg Financial Centre**

### HOT TOPIC: ALTERNATIVE INVESTMENT OPTIONS FOR THE HNWS

#### 9.00 Real estate investment strategies for HNWS



- Assessing the impact of low interest rates on real estate investment
- What investment opportunities are proving the most attractive for HNWS?
  - buying distressed debt
  - joining a portfolio consortium
  - access to unlisted property investments
  - investing in a new development
  - REITs?
- Comparing the pros and cons of increasing HNWS exposure to real estate, indirect and direct

**Morgan Laughlin**

Managing Director, Head of Non-Japan, Asia

**DB Real Estate, Hong Kong**

#### Panel discussion

##### 9.30 Evaluating the role of hedge funds and FoF in a HNWS portfolio

- Successfully integrating your hedge fund investment into your over client portfolio without jeopardizing your risk/reward strategy
- Assessing the case for fund of hedge funds for HNWS
  - has exposure of HNWS increased to hedge funds? What are the reasons behind this?
- Why bother to use a private banker/financial advisor when selecting a hedge fund or FoF? How important are capital guarantees to the really rich HNWS?

Panellists:

**Jeng-tek Low**

Director

**Everest Capital, Singapore**

**Christoph Rubeli**

Partner

**Partners Group, Switzerland**



**Mark Powers**

President

**Powers & Dubin, USA**



**Stephen Pak**

Chief Investment Officer – Asia

**CSFB Private Bank, Hong Kong**

Moderator:



**Matt Dillon**

Regional Manager – Asia Pacific

**Man Investments, Hong Kong**

##### 10.10 Evaluating structured alternative investments as a strategy to achieve exposure to hedge funds

- Comparing hedge funds with managed accounts
- Analysing the business case for investable indices - MSCI HII
- Evaluating CPPI vs. option based structures

**Laurence Laveau**

Vice President - Equity Derivatives Sales

**SG Corporate & Investment Banking, Hong Kong**

### 10.40 Morning refreshments

### KEEPING THE CUSTOMER SATISFIED

#### Panel discussion

##### 11.20 Excelling in your customer service strategy

- Why do clients go with certain private banks or private bankers?
- Determining which are the best metrics to implement to measure client satisfaction
- Developing a strategy that achieves referrals
- Assessing the advantages and disadvantages of instigating an effective online private banking system
- What incentives and performance criteria should private bankers be using for rewarding staff? Are they following best practice?

## High Net Wealth Management

Panellists:

**Phick Fui Yeong**  
Managing - Head of private banking  
**DBS Private Banking, Singapore**



**Stuart Cain**  
Director  
**Goldman Sachs JB Were, Australia**



**Olaf Chalmer**  
Chief Executive Officer  
**CH Capital, Luxembourg**

Moderator:



**Alain Mestat**  
President of the Promotion Board  
**Luxembourg Financial Centre**

**12.00 Developing effective client retention strategies**

- When relationship managers leave they typically take 50% of their clients with them – how as a private bank do you stop such high churn?
- Recruiting and retaining the best staff
- Determining the importance of the following in a private banks retention process:
  - monitoring of activity levels
  - standard response time for complaints
  - loyalty/reward schemes
  - compensation component (retention performance measures)
  - prompt dealing of customer complaints
  - discounts/waivers
  - targeted marketing plans



**Rajesh Malkani**  
Managing Director  
**BNP Paribas, Singapore**

**12.30 Networking lunch****NEW DIRECTIONS AND OPPORTUNITIES IN PRIVATE BANKING**

Panel discussion

**2.00 Examining the opportunities that outsourcing financial advice may bring to a private banking operation**

- Reviewing the increasing commoditisation of the following systems and processes:
  - asset management & provision
  - middle office
  - back office
  - support processes
  - product evaluation
- How can service quality, client/data privacy and compliance be guaranteed if you outsource?
- Developing an effective cost-benefit evaluation framework to assess what should and should not be outsourced

Panellists:



**Kumar Subramanian**  
CEO  
**Adventity, India**



**Donna Nicolof**  
Head of Private Banking  
**National Private Bank, Australia**



**John B. Trammell**  
Chief Executive Officer  
**Investor Select Advisors, USA**

Moderator:



**Garry Hawker**  
Head of Investing Consulting  
**Mercer, Singapore**

**CASE STUDY:****2.40 Targeting new money: evaluating the advantages of a private bank focusing on the 'affluent' investor**

- Identifying the challenges of targeting the mass affluent investor
  - why are some private banks hesitant to go after this market?
- Developing a customer acquisition strategy – what are the timelines for winning affluent investors?
- Mass affluent investor strategies vs HNW strategies

**Arpit Agarwal**  
Head of Private Banking  
**ICICI Bank, India**

**3.10 Afternoon refreshments****CRYSTAL BALL GAZING: THE ROAD AHEAD**

Panel discussion

**3.40 Predicting which will become the major Asian HNW opportunities**

- What geographical Asian HNW markets can we expect to see grow over the next 5 years?
- Identifying what will be the key growth strategies for private banks
- What products and services will be the big growth industries for private banks?
- How will the goals and investment attitude of the HNW evolve?

Panellists:



**Elaine Lai**  
General Manager – Wealth Management  
**Standard Chartered Bank, China**



**Sharad Nair**  
Assistant Vice-President – Investment & Privilege Banking  
**Mashreqbank, Dubai**



**Rahul Malhotra**  
Global Business Manager for the Non Resident Indian Business  
**Citibank, UK**

Moderator:



**Annie Wee**  
Executive Director & Chief Executive Officer  
**Wealth Management Institute**

**Round table panel discussion****4.20 Alternative investment options**

At the end of this session each delegate will be asked to join a table of their choice to discuss and network with like-minded individuals facing similar challenges. Each round table will be led by an industry expert.

*Round table 1: Hedge funds and FoF*

**Chris Choy**  
Chief Executive Officer  
**Pacific World Asset Management, Hong Kong**

*Round table 2: Real estate*

**Loh Chin Hua**  
Managing Director  
**Alpha Investment Partners, Singapore**

*Round table 3: Structured products*

**Markus Ruffner**  
Partner  
**NPB Neue Private Bank, Switzerland**

*Round table 4: Private equity/Venture Capital*

**Sanjay Hundiwalla**  
Senior Vice President - Direct Investments  
**United Gulf Management, USA**

*Round table 5: 'Soft' Assets (Art, Jewellery, Paintings etc)*

**Irene Lee**  
General Manager  
**Singapore Tyler Print Institute**

*Round table 6: Philanthropy*

**Terry Ferris**  
Head of Philanthropy Asia  
**Mees Pierson, Singapore**

**5.00 Chair's closing remarks and close of conference**

Post-conference masterclasses  
(Separately bookable)

## Winning and retaining HNW clients – Becoming the trusted advisor

Led by **Tim Egold**, Managing Director, **Dale Carnegie, Singapore**

### Objective

When targeting the HNW market, private banks face three main challenges. Who to target, how to target, and how to retain. This masterclass will look at these three issues and provide private banks with practical knowledge on how to increase their effectiveness in these key areas.

### Timing

Registration will be at 08.30am. The masterclass will run from 9am through to 12.30pm.

#### Session 1: Who to target?

##### Issues discussed will include:

- Should private banks be going after new clients or looking to increase their slice of their existing HNW customers' business?
- Defining your target market
- Types of HNWs to target.
- How do their demands differ?
- How have their service/product requirements changed?

#### Session 2: How to target?

##### Issues discussed will include:

- Sales and marketing approaches - determining the optimum sales mix
  - direct marketing/advertising/leveraging brand
  - phone
  - social events
  - face-to-face meetings
- How to organize your private banking team
- Case study of private bank strategy who has successfully increased its HNW share
- Product strategy – in-house products/product lists/outsourcing products/open product architectures

#### Session 3: How to retain?

##### Issues discussed will include:

- Successful staff retention strategies
- Strategies for retaining the customer when you lose one of your key staff members to the opposition
- Incentives and recruitment strategies for HNW advisors/ private banks
- Successful client retention strategies. Implementing a successful ongoing customer contact strategy
- Measuring customer satisfaction - KPIs
- The role of technology as part of customer service strategy

### About your masterclass leader:

**Tim Egold** heads up Dale Carnegie Training for Singapore. He has trained over 200,000 individuals in the art of sales and customer service. He has worked with amongst others the private banking arms of HSBC, UBS and Credit Suisse.

Dale Carnegie Training provides a variety of tailored training programs in both English & Mandarin. With a 96% average customer satisfaction rating, Dale Carnegie Training is a world leader in enabling individuals to maximize their potential.

For more information please visit [www.dalecarnegie.com](http://www.dalecarnegie.com) or call Tim on +65 6220 3836

## Understanding trust and tax issues in wealth management

Led by **David Chong**, Director, **Portcullis TrustNet Group**

### Objective

This 1/2 day masterclass will provide a comprehensive overview of current trust and tax issues in wealth management in Asia. The delegates will gain a practical understanding of the latest developments in trust and tax issues for wealth management and how they can pass on practical knowledge to their clients.

### Timing

Registration will be at 1.45pm. The masterclass will run from 2pm through to 5.30pm

#### Session 1: Review of latest trust legislation

- Singapore
- Hong Kong
- Labuan
- Samoa
- Cook Islands
- Mauritius
- Brunei
- BVI
- Cayman Islands
- Implications for wealth management

#### Session 2: Taxation issues in wealth management?

- Understanding the implications of new tax legislation for trustees
- International tax structuring
- Current tax planning using trusts

#### Session 3: Wrap up and Q&A



**David Chong** is the Senior Partner of the law firm, David Chong & Co. and he is a Director of the Portcullis TrustNet group of trust companies with offices in Singapore, Hong Kong, Samoa, Cook Islands, British Virgin Islands, Beijing, Kuala Lumpur and Labuan (Malaysia) and Mauritius.

David purchased the TrustNet group of companies year 2004. David adds extensive industry related experience to both the directors and to senior management of the group. David matriculated in the UK and qualified with a Master's Degree in Law and a Master's Degree in Business.

David was the first President of Society of Trust & Estate Practitioners (STEP) (Singapore Chapter) and is the President of STEP (Malaysia Chapter); and the Deputy President of the Offshore Institute. He is a member of the Labuan IOFC Tax Consultative Committee.

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## High Net Wealth Management

## Sponsorship Opportunities

**Private Banking Asia** presents you with a unique opportunity to deepen branding and relationships with the major global corporations.

The **Private Banking Asia** team has the knowledge and understanding to develop and implement integrated and comprehensive marketing campaigns designed to identify and deliver all elements of the value chain. We work closely with sponsors and exhibitors, actively targeting their established and potential client base to ensure that we deliver the audience that they want.

Highly flexible and dynamic combinations of branding opportunities exist for sponsor and partners – before, during and after the event. Your name will be in front of tens of thousands of professionals, guaranteeing enhanced reputation, profile and awareness amongst your target markets.

## Why you should sponsor

**Enjoy WORLDWIDE Publicity**

The promotional campaign will guarantee widespread publicity for the event and sponsor. 30,000 colour conference brochures will be distributed internationally. Publicity and promotional materials will carry the sponsor's corporate logo, giving you widespread industry profile.

**Obtain Direct Access to Potential Clients during and after the event**

At the event, the sponsor will have direct access to a focused group of key decision-makers. Attending delegates will be in a position to access the quality and range of professional services provided by the sponsoring organisation. You will be able to renew or establish contacts and source for leads at the event. Contacts can be pursued further via the delegate list. This meticulously prepared confidential delegate list comprising of key industry players will be made available to the sponsoring company for its own marketing purposes.

**Address the delegates as a KEY speaker**

We ensure that our sponsors receive KEY speaking positions to address an audience of top cards executives.

**Distribute Permanent Reminders of Services Provided**

The conference documents will feature the sponsoring company's profile, products and services. This will serve as a valuable reference source and reminder of the services available from the sponsor.

**Profile Yourself As An Industry Leader**

The sponsors' logos and company literature will be featured prominently in the main printed materials. In addition, your generous sponsorship will be recognised in our awareness campaign, in the form of banners, brochures, and other publicity materials. This will serve as an excellent platform to reiterate your leadership position in the industry.

**Enhance Your Corporate Image**

By sponsoring the event through the various sponsorship schemes, your image will be favorably enhanced, as it will provide you with opportunities to display your investment and show your commitment to your clients and associates.

**Web Site Linkage**

Our World Wide Web page promotes the event internationally. Link your web site to ours to further allow for an unparalleled opportunity to raise your company's profile and strengthen your relations with current and potential clients.

## Who should sponsor?

Terrapinn considers it essential that the sponsors and exhibitors at Private Banking Asia 2005 showcase services that are directly relevant to the interests of our corporate delegates and visitors.

## Our preferred partners include:

- Fund managers
- Insurance companies
- Assurance companies
- Offshore banks
- Real estate investment companies
- Retail hedge funds
- Tax consultants
- Private banks



**For sponsorship opportunities,  
please contact Gisete Tay,  
Project Manager at  
Tel: (65) 6322 2755 or  
email: [gisete.tay@terrapinn.com](mailto:gisete.tay@terrapinn.com)**

Participants may be eligible for Financial Sector Development Fund (FSDF) support on a case by case basis. Interested applicants should submit their applications to the FSDF Secretariat directly. More details on the FSDF can be found at <http://www.mas.gov.sg>.

## Silver Sponsors

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**GAM** delivers active investment management with distinction to private clients, institutions and intermediaries. Its goal is to produce outstanding results for clients by providing access to great investment talent throughout the world. All of GAM's fund managers, whether employed by GAM or contracted to GAM, have freedom to perform. As well as active management within funds, GAM uses active asset allocation to combine funds in managed portfolios that meet clients' diverse needs. GAM's funds and strategies cover a broad range of asset classes, currencies and market conditions. It has long experience of hedge funds and funds of hedge funds. With personal attention to detail and client-friendly technology, GAM provides excellent service to clients. It manages more than \$38 billion\* of clients' assets from nine offices around the world. Established in 1983 by its visionary founder, Gilbert de Botton, GAM has been owned by UBS AG since 1999. It continues to have a distinctive style and culture.

*Data as at 31 December 2004*



**Société Générale** has a proven track record and a leading market reputation for tailoring structured products to suit unique investor needs in a variety of market conditions. SG is an established specialist in equity derivatives and was recognised by the industry as such when awarded the title "Equity Derivatives House of the Year 2004" by The Asset, Risk Magazine, IFR magazine and The Banker.

## Associate Sponsor

**SEARCH PARTNERS LIMITED**  
Banking • Securities • Asset Management

## Registration form

# PRIVATE BANKING Asia 2005



11 - 13 July, Grand Hyatt,  
Singapore

## 4 easy ways to register

**Phone:** (65) 6322 2700

**Fax:** (65) 6223 3554

**Website:** <http://www.fundsmanagementworld.com/2005/pba>

**Post** Terrapinn Pte Ltd  
12 Prince Edward Road, #03-01, Podium A  
Bestway Building, Singapore 079212

**Biz Regn. No.:** 198902388R

If you have any enquiries regarding this conference, please contact Rani at [rani.kuppusamy@terrapinn.com](mailto:rani.kuppusamy@terrapinn.com)

## Yes, please register me for:

Package	Dates	Regular fee (Registrations received after 30-03-05)	Early bird fee (Registrations received before 30-03-05)
<input type="checkbox"/> 3 day Gold Pass	11 - 13 July 2005	SGD 3,495	SGD 2,995 <b>Save SGD 500</b>
<input type="checkbox"/> 2 day conference plus one half day masterclass <i>Please specify which masterclass</i>	11 - 13 July 2005	SGD 3,290	SGD 2,910 <b>Save SGD 380</b>
<input type="checkbox"/> 2 day conference	11 - 12 July 2005	SGD 2,795	SGD 2,515 <b>Save SGD 280</b>
<input type="checkbox"/> Both masterclasses	13 July 2005	SGD 895	SGD 795 <b>Save SGD 100</b>
<input type="checkbox"/> One masterclass only <i>Please specify which masterclass</i>	13 July 2005	SGD 495	SGD 445 <b>Save SGD 50</b>
<input type="checkbox"/> Dale Carnegie Masterclass 9am - 1pm <input type="checkbox"/> David Chong Masterclass 2pm - 5.30pm			

**Register before  
30 April and  
save 10%**

**Seats are limited.  
Register early to avoid  
disappointment**

5% GST for local delegates

Payment must be received 7 days before the conference date in order to guarantee your place. Delegates may be refused admission if payment is not received prior to the conference. The fee does not include hotel accommodation.

## Corporate groups. Yes, I want to send the team and save even more.

Delegates	Package	Normal Price	Special Price
<input type="checkbox"/> 6	2 day pass	SGD16,770	SGD13,416 <b>Save SGD 3,354</b>
<input type="checkbox"/> 8	2 day pass	SGD22,360	SGD17,440 <b>Save SGD 4,920</b>
<input type="checkbox"/> 10	2 day pass	SGD27,950	SGD20,960 <b>Save SGD 6,990</b>

## Benefits to corporate groups:

- Reserved seats in conference
- Priority check in
- VIP registration pack

\*\* Only one discount scheme applies

## Attendees details

	Mr/Mrs/Ms	Full name	Job title	Telephone	Email
1					
2					
3					

## Company details

Organisation name: .....  
Address: .....  
Postcode: ..... Country: .....  
Industry: .....  
Tel: ..... Fax: .....

## Method of payment

Registration is ONLY confirmed on receipt of payment. Please quote **161071**, your company name and delegate(s) name(s).

- ☐ Bank Transfer  
☐ Crossed cheque payable to Terrapinn Pte Ltd  
☐ Please invoice me  
☐ American Express ☐ Mastercard ☐ Visa ☐ JCB

Card Number: .....

Cardholder's Name: .....

Cardholder's Signature: .....

Expiry Date: .....

## Bank Transfers:

Payment by bank transfer must quote the delegate name and reference below. Transfers should be made to Standard Chartered Bank, 6 Battery Road, Singapore 049909

**Account name: Terrapinn Pte Ltd, Account No. 01-0089045-8.**

**PAYMENT MUST BE RECEIVED BEFORE THE CONFERENCE DATE IN ORDER TO GUARANTEE YOUR PLACE. REFERENCE - 161071**

## For official use only

Received: ☐ Date: ..... Code: 161071 ABCDEFGHIJKLMNOPQRSTUVWXYZ

## Venue and hotel accommodation

**Venue:** Grand Hyatt Singapore  
10-12 Scotts Road, Singapore 228211  
**Tel:** +65 6235 4111, **Fax:** +65 6734 0375

## Hotel Accommodation:

Special corporate rate have been negotiated for conference delegates. Please make your bookings directly with the hotel. To take advantage of the special rates for conference delegates, please indicate that you are attending Terrapinn's **Private Banking Asia 2005**.

## Data protection

Terrapinn (or its agents) may contact you by mail, phone or email about products and services offered by Terrapinn and its group companies, which Terrapinn believes may be of interest to you, or about relevant products and services offered by reputable third parties. Terrapinn may also disclose your contact details to such third parties to enable them to contact you directly. Certain entities to which Terrapinn discloses your contact details are located in territories overseas which have fewer legal safeguards to protect personal data. By returning this form to us, you agree to our processing of your personal information in this way. Please tick the appropriate box if you do not wish to receive such information from:

- ☐ the Terrapinn group/Terrapinn; or ☐ reputable third parties.

## Cancellation and transfer

Should you be unable to attend, a substitute delegate is welcome at no extra charge. Alternatively, you may choose to credit the full value of your registration towards a future Terrapinn event. A full refund, less 10% administrative charge, will be made for cancellations received in writing at least three weeks prior to the conference. A 50% refund and the course documentation will be provided for cancellations received in writing two weeks in advance. The company regrets that no refunds will be made for cancellations received less than two weeks prior to the conference. A complete set of course documentation will, however, be sent to you. Terrapinn reserves the right to cancel or alter the content and timing of the program or the identity of the speakers for reasons beyond its control.