



private wealth management
APAC SUMMIT



a **marcusevans** event

PWM APAC Summit 2016

17 – 19 October 2016 | Conrad Macao | Cotai Central | Macao | www.pwmsummit.com

Monday 17 October	
10:00-12:00	Event Registration [Dunhuang Foyer]
12:00-13:00	Welcome Lunch [Dunhuang Ballroom 4507 & 4407]
13:00-13:15	marcusevans Welcome Address [Dunhuang Ballroom 4403] Erika Emil Rinaldi , Executive Producer, marcusevans
	Chairman's Opening Address [Room] Elsa Pau , Founder, Publisher & CEO, WealthAsia Media
13:15-14:00	Opening Keynote Presentation [Dunhuang Ballroom 4403] Traversing Through Turbulence: Forecasting the 2020 Crystal Ball of Global and Regional Investment Opportunities Simon Baptist , Chief Economist, EIU
14:00-14:45	Presentation [Dunhuang Ballroom 4403] Establishing the Building Blocks in Creating Stewardship for a Lifetime and Beyond Florence Koh , Group Advisor, Koh Family Trust
14:45-15:15	Networking Coffee Break [Dunhuang Ballroom 4505 & 4405]
	Sponsor Briefing [Dunhuang Ballroom 4403]
15:15-17:15	One-to-One Meetings [Dunhuang Ballroom 4505 & 4405]
17:15-18:15	The Co-Investments Forum [Dunhuang Ballroom 4403] United Approach: Creating a Solid Family Office Partnership to Sustain Co-investment Opportunities in Uncertain Economic Times Dillon Hale , CEO, Peninsula Capital Asia John Ng , MD, Simon Murray & Company Kevin Liu , CEO, Junson Capital
18:15-19:00	Presentation [Dunhuang Ballroom 4403] All Things Fintech: Deriving Insights from the Latest Disruption to Private Wealth Management Zennon Kapron , Founder, Kapronasia
19:00-19:45	Keynote Presentation [Dunhuang Ballroom 4403] Evaluating New Economic and Geopolitical Shifts in Global Markets to Capture Hidden Potential Dan Steinbock , President, Difference Group
19:45-20:15	Welcome Reception [Dunhuang Ballroom 4507 & 4407]
20:15-20:45	Welcome Dinner [Dunhuang Ballroom 4507 & 4407]



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Tuesday 18 October	
07:30-08:45	Breakfast [Grand Orbit]
09:00-09:45	Presentation [Dunhuang Ballroom 4403] Building Resilient Liquidity Portfolios to Alleviate Risks and Asset Downfalls Rakesh Gupta , President AMAS IPS, Hinduja Group
09:45-10:30	Parallel Sessions: Please Choose
Option A	Masterclass [Dunhuang Ballroom 4403] HSZ Group
Option B	Masterclass [Dunhuang 4401A & 4401B] Lennar International
10:30-10:45	Networking Coffee Break [Dunhuang Ballroom 4505 & 4405]
10:45-12:45	One-to-One Meetings [Dunhuang Ballroom 4505 & 4405]
12:45-13:45	Lunch [Dunhuang Ballroom 4507 & 4407]
13:45-14:30	Keynote Presentation [Dunhuang Ballroom 4403] Fuelling Entrepreneurial Spirit: Paving the Way for More Generations of Success Ronald Walla , President Director, Wismilak
14:30-15:15	Parallel Sessions: Please Choose
Option A	Presentation [Dunhuang Ballroom 4403] India's Flourishing Opportunity Window: Balancing the Growth of Alternative Investments with a Successful Risk Management Plan Rajesh Saluja , CEO & MD, ASK Wealth Advisors
Option B	Presentation [Dunhuang 4401A & 4401B] Koketsu Ni Irazunba Koji Wo Ezu, Nothing Ventured, Nothing Gained: Insights on the Thriving and Traditional Japanese Economy Makoto Ohsawa , CEO, FEMO
15:15-15:30	Networking Coffee Break [Dunhuang Ballroom 4505 & 4405]
15:30-17:30	One-to-One Meetings [Dunhuang Ballroom 4505 & 4405]
17:30-18:15	Presentation [Dunhuang Ballroom 4403] Money is Secondary: Unlocking the Ultimate Secrets to Family Harmony and Succession Ann Cooley , Founder & Chairman, Pacific Hawk, Cooley Family Office
18:15-19:00	Presentation [Dunhuang Ballroom 4403] Rags to Riches: Lessons on Leading a Legacy with Malaysia's Iron Lady Datuk Wira Dr Maznah , Executive Chairman, Securiforce Group
19:00	Evening Reception – Join us for a cocktail dinner to maximise informal networking opportunities! [Dunhuang Ballroom 4507 & 4407]



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Wednesday 19 October	
07:30-08:45	Breakfast and hotel check-out [Grand Orbit]
09:00-09:45	Presentation [Dunhuang Ballroom 4403] Overcoming Asset Allocation and Wealth Expansion Challenges to Facilitate Further Growth of India's Private Wealth Pool Munish Randev, CIO, Waterfield Advisors
09:45-10:30	Presentation [Dunhuang Ballroom 4403] The Paramount Service: Forming Great Relationships and Trust between Advisors and UHNWs Rohit Bhuta, CEO, Crossinvest Asia
10:30-10:45	Networking Coffee Break [Dunhuang Ballroom 4505 & 4405]
10:45-12:15	One-to-One Meetings [Dunhuang Ballroom 4505 & 4405]
12:15-13:00	Presentation [Dunhuang Ballroom 4403] Shaping a Sustainable Governance Plan by Grasping Diverse Asian Family Cultures and Values Dr Tony Gao Hao, Director Global Family Business Research Center, PBC School of Finance, Tsinghua University
13:00-13:45	Closing Presentation [Dunhuang Ballroom 4403] Thriving in Turbulent Times: Investigating Growing Opportunities in Asian Private Equity despite Economic Volatility Bruce Merivale-Austin, MD & Principal, DM Partners
13:45-14:00	Chairman's Closing Comments [Dunhuang Ballroom 4403] Elsa Pau, Founder, Publisher & CEO, WealthAsia Media Prize Draw – Hand in your evaluation form to qualify!
14:00-15:00	Closing Lunch [Dunhuang Ballroom 4507 & 4407]