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BANK ISLAM  
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Labuan IBFC  
International Business and  
Financial Centre, Malaysia

Supported by:



Centre for  
Family Business

EPPL HK

## NAVIGATING GLOBAL WEALTH AND SUCCESSION STRATEGIES: RESIDENCY & CITIZENSHIP SOLUTIONS FOR ESTATE PLANNERS

6 SEPTEMBER 2024, 10AM (GMT +8)

JW MARRIOTT HOTEL HONG KONG,  
88 QUEENSWAY, ADMIRALTY, HONG KONG

FOR MORE INFO

In conjunction with Estate Planning Practitioners Limited's inaugural overseas forum, Labuan International Business Financial Centre, Bank Islam Trust Company (Labuan) Ltd and Latitude Consultancy Ltd will jointly host an exclusive post-forum masterclass titled **"Navigating Global Wealth and Succession Strategies: Residency & Citizenship Solutions for Estate Planners"** on 6 September 2024 at JW Marriott Hotel Hong Kong.

This masterclass is designed specifically for estate planners seeking cutting-edge insights into cross-border business structuring and comprehensive wealth management strategies. Throughout this session, esteemed experts will explore pivotal topics essential for crafting robust estate and succession plans in today's global landscape, including cross-border solutions, asset protection structures, and legacy family planning.

Discover unparalleled opportunities with us to enhance your client strategies and solutions. Secure your spot now for this dynamic event that blends knowledge-sharing with collaborative networking.

Seats are on a first-come, first-served basis. For further inquiries, please email us at [events@libfc.com](mailto:events@libfc.com).

*(Consecutive translation from English to Mandarin will be provided during the masterclass)*

### AGENDA

9.30AM Registration & Arrival of Guests

10.00AM **Welcome Remarks**  
Cindy Wong, TEP, Founder Director, Estate Planning Practitioners (HK) Ltd.

10.10AM **Presentation: Labuan IBFC: A Strategic Advantage for Estate Planners - Benefits and Innovative Solutions for Cross-Border Business Structuring:**

- Overview of Labuan IBFC and How to Leverage Its Strategic Advantages
- Learn how Labuan IBFC Simplifies and Enhances Your Cross-Border Business Operations with Innovative Structures

Serene Liaw, Deputy Director, Strategic Planning & Investor Relations, Labuan IBFC Inc.

- 10.40AM**      **Presentation: A Comprehensive Wealth and Succession Strategies via Labuan IBFC**
- **Labuan IBFC: Structures and Operational Requirements – Private Foundation, Charitable Foundation and Labuan Company**
  - **Labuan IBFC: Compliance Landscape – Solving the Puzzles of Bank Account Opening Challenges**

**Masdayana Md Setamam, Director, Labuan Offshore Business, Bank Islam Malaysia Berhad, Chief Executive Officer/Principal Officer, Bank Islam Trust Ltd.**

- 11.10AM**      **Presentation: Creating a Lasting Family Legacy: How to Leverage Residency and Citizenship by Investment Programmes for a Prosperous Future**
- **Understand the Strategic Benefits of These Programmes in Achieving Long-Term Family Legacy Goals and Wealth Preservation**

**Aleksandra Smolen, Regional Director, Hong Kong, Latitude Consultancy Limited**

- 11.40AM**      **Panel Discussion: Navigating Regional Wealth and Succession - Integrating Citizenship Solutions for Estate Planners**

Our esteemed experts will explore pivotal topics essential for crafting robust estate and succession plans in today's global landscape, including cross-border solutions, asset protection structures, and legacy family planning.

**Moderator:**

**Professor Marshall Jen, Executive Director, The Chinese University of Hong Kong, Centre for Family Business**

**Panellists:**

- **Masdayana Md Setamam, Director, Labuan Offshore Business, Bank Islam Malaysia Berhad, Chief Executive Officer/Principal Officer, Bank Islam Trust Ltd.**
- **Amy Zhang TEP, Managing Director, Hawksburn Heritage Singapore**
- **Serene Liaw, Deputy Director, Strategic Planning & Investor Relations, Labuan IBFC Inc.**
- **Aleksandra Smolen, Regional Director, Hong Kong, Latitude Consultancy Limited**

- 12.30PM**      **Ends**