

27 JUNE
2024

CLICK HERE
to register

THURSDAY

9:30am to 4:30pm

Sime Darby Convention Center, Ballroom

1A, Jalan Bukit Kiara 1, Bukit Kiara, 60000 Kuala Lumpur,
Wilayah Persekutuan Kuala Lumpur

STEP Malaysia Conference

Navigating Succession and Estate Planning in Malaysia and Labuan IBFC

EARLY BIRD PRICE*

STEP Member: **RM300**

Supporting Association Member: **RM350**

Non-STEP Member: **RM400**

*Early bird price for tickets purchased before **15 June 2024**

NORMAL PRICE

STEP Member: **RM400**

Supporting Association Member: **RM450**

Non-STEP Member: **RM500**

Malaysia, with its diverse legal landscape blending Shariah, common law principles and legislative framework, offers a rich tapestry of estate planning options for local citizens and foreign nationals.

Labuan IBFC, known as Asia's premier international financial hub, is particularly unique for its diverse array of succession and estate planning catering for both Islamic and non-Islamic structures and solutions to safeguard and preserve ultra-high net worth family wealth across generations.

Join us at the **STEP Malaysia Conference – Navigating Succession and Estate Planning in Malaysia and Labuan IBFC**. This conference will cover topics ranging from estate planning fundamentals and taxation considerations to issues and strategies for family businesses, multi-generational wealth transfer practice in Malaysia, along with highlighting Labuan IBFC's unique wealth and estate management offerings. It's also an opportune moment to reconnect with fellow advisors both locally and internationally.

AGENDA

- 9.00am** Arrival and registration
- 9.30am** Event starts
- 9.35am** **Welcome speech** by Farah Deba, STEP Malaysia Chairperson
- 9.40am** **Opening remarks** by Datuk Iskandar Mohd Nuli, Executive Chairman cum CEO, Labuan IBFC Inc
- 9.45am** **Session 1 – Family Offices and Succession**
Speaker: David Chong, Founder & President, Baxian Group
- 10.30am** Coffee tea break
- 10.45am** **Session 2 – Private Wealth Management: Complementing Tools in Estate Planning**
Moderator: Chris Foong , Director of Rockwills Advisory Services S/B
Speakers:
1. Siti Nita Zuhra Binti Mohd Nazri, Deputy CEO, Etiqa International Holdings Sdn Bhd
2. Idi Irwan, Executive Director in Bill Morrisons Wealth Management Sdn Bhd
3. Lim Eng Ping, Head, Maybank Private Malaysia
- 11.30am** **Session 3 – Is Mental Incapacity a Legal or Medical Problem? How do we navigate the lacuna in law and what are doctors’ best practices.**
Moderator: Datin Anit Kaur Randhawa, Partner with Asbir, Hira Singh & Co
Speakers:
1. Shanti Abraham, President 2022-2024 of the Medico-Legal Society of Malaysia
2. Dr Mark Tan Kiak Min, Lecturer, Medical Ethics & Law Department, Faculty of Medicine, UiTM
- 12.15pm** Lunch and networking
- 1.45pm** **Session 4 – Fireside chat: Challenges Faced by Fiduciaries**
Moderator: Anuar Shuib, Chairman of the International Development Committee of the MFPC
Panelists:
1. Chithra Ganesalingam, Senior Associate, Messrs Wong Lu Peen & Tunku Alina
2. Colin Seah, Managing Director of ITMC Labuan
- 2.30pm** **Session 5 – Talking Points: The Essentials for Effective Succession and Estate Planning for Family Businesses**
Panelists:
1. Millie Chan, Founder, Legacy 127 Consulting Inc.
2. Valerie Wu, Partner, Head of Tax & Private Wealth Asia of Pinsent Masons
- 3.15pm** Coffee tea break
- 3.30pm** **Session 6 – Labuan IBFC Offerings**
Part 1: Conventional / General
Moderator: Gerard Roy Suresh Sharma, Managing Director/Principal Office of Asia Reinsurance Brokers (Labuan) Ltd
Speakers:
1. Doreen Fadli, Head of Business Policy and Tax Development at Labuan FSA
2. Datuk Chin Chee Kee, Chairman of ALTC & MD of Noblehouse
Part 2: Islamic Solutions
Speaker: Ja’afar Rifan, Head of Islamic Business Development of Labuan FSA
- 4.30pm** Event ends
- 4.40pm** Networking with coffee & light refreshments

Note: The organizer reserves the right to alter the event program or content at any time without giving prior notice to the participants.