

# “SUCCESSFUL PRESERVATION OF WEALTH ACROSS GENERATIONS”

26 August 2017 (Saturday) / 8.30am – 2.00pm / Venue : The Club, Bukit Utama, Bandar Utama, PJ

## Seminar Highlights

Time	Agenda
8.30am – 9.00am	Registration & Door Gifts
9.00am – 9.10am	Opening Remarks by Tan Sri Datuk Amar Steve Shim Lip Kiong Chairman Pacific Trustees Group
9.10am – 9.20am	Key Notes Address by Ms Linnet Lee CEO of FPAM
9.20am – 9.50am	Labuan Trust & Foundation: Securing Family Wealth for Future Generations Speaker: Puan Azwah Mohamad Labuan IBFC
9.50am -10.20am	Wealth Planting & Nurturing your Future Wealth Speaker: Mr Raymond Tay Director, PhilipCapital Malaysia
10.20am – 10.45am	Tea Break & Networking
10.45am-11.15am	Philanthropy Speaker: Mr Chan Jau Yuan Grp Client Manager, Pacific Trustees Bhd
11.15pm – 11.45pm	Why Corporate Trustee for your Will? Speaker: Mr Joshua Kuan Advocate, Joshua & Associates
11.45pm – 12.30pm	Successful Wealth Preservation across Multiple Generations Speaker: Mr Richard Chow GM, Pacific Trustees Bhd
12.30pm – 1.00pm	Panelist Discussion Puan Azwah Mohamad Mr Joshua Kuan Mr Raymond Tay Mr Richard Chow Mr Tan Beng Hong
1.00pm – 2.00pm	Lunch & Networking

5 CE by FPAM

## Seminar Fees

**Early Bird Discounts or Group Registration of more than 5 pax**

- Payment by or before 31 July, RM38 per pax.

**Seminar Fee after 31 July**

- RM50 per pax.

*All payments should be made by or before 21 August 2017.*

## Speakers



**Ms Azwah Mohamad Noor, Director, Biz Dev (S'pore),  
Labuan IBFC**

Azwah Mohamad Noor is Labuan IBFC Inc's representative in Singapore. Her role also involved crafting strategic objectives, annual business plans and proposal papers, and leading the investment team to achieve consistent foreign and local investment inflows in key promoted sectors. In managing stakeholders she was also tasked to develop, maintain, leverage and strengthen alliances with stakeholders to achieve their mutual goals and objectives.



**Mr Raymond Tay, Wealth Planning Director,  
PhillipWealth Planners Sdn Bhd**

Raymond Tay is currently the Wealth Planning Director of Phillip Wealth Planners Sdn Bhd and Group Financial Consultant of Phillip Mutual Bhd. He also contributes to society for more than a decade by currently holding notable NGO positions as Honorary Deputy Secretary-General of Johor Bahru Chinese Chamber of Commerce & Industry, Chairman of Socio-Economic Research Committee for Johor Associated Chinese Chambers of Commerce & Industry, and Member of Finance & Capital Market committee for The Associated Chinese Chambers of Commerce and Industry of Malaysia.



**Mr Chan Jau Yuan, Grp Client Mgr, Pacific Trustees Bhd**

Chan Jau Yuan has a Bachelor of Arts (Honours) Commerce from Liverpool John Moores University in 2007. He is holding the Trust and Estate Practitioner (TEP) status and a Full Member of The Society of Trust and Estate Practitioners (STEP). He has vast local and international working experience in various jurisdictions, namely Malaysia, Labuan, Singapore, Hong Kong and Jersey Channel Island.



**Mr Joshua Kuan, Advocate, Messrs Joshua & Asso.**

Joshua Kuan graduated from the University of West of England, Bristol with LL.B (Hons) in 2009. Joshua has handled more than 200 cases of Grant of Probate applications, Letter of Administration and Small Estate Distribution applications at various High Courts and Land Offices including contested proceedings. He has also conducted various legal seminars on Probate & Administration, Family Law, Business Law, etc.



**Mr Richard Chow, GM, Pacific Trustees Bhd**

Richard Chow graduated with a Bachelor of Law (Honours) from University of Wales in 1986 was admitted as an Advocate & Solicitor of the High Court of Malaya in 1989. He has been giving talks and training to financial planning companies on the subjects of Will, Trust and Estate Planning. More recently on 30 March 2017, he was also a speaker for the Association of Trust Companies Malaysia at the inaugural SSM conference on interest schemes under the new Interest Schemes Act 2016.

## REGISTRATION FORM

Please email this registration form to: [ptsupport@pacifictrustees.com](mailto:ptsupport@pacifictrustees.com)

Tel No: 03-2166 8830 (Private Trust Division)

Fax No: 03-21663830

Contact persons: [Suhana Mohd Fazil](#) . [George Chang](#) . [Gaihari Cicelia](#) . [Elisabeth Soong](#) .

Name: \_\_\_\_\_

Organization/Institution: \_\_\_\_\_

Designation: \_\_\_\_\_

Mailing address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Mobile Phone: \_\_\_\_\_

Fax No: \_\_\_\_\_

E-mail: \_\_\_\_\_

FPAM membership No. \_\_\_\_\_

### METHOD OF PAYMENT

(  ) Cheque

(  ) Fund transfer (Giro or Instant Giro)

Payment must be made payable to “**Pacific Trustees Berhad**”.

Bank: **Malayan Banking Berhad**

Account No: **514057638735**

### **CANCELLATION / SUBSTITUTION**

**No Cancellation is allowed. However, substitute participants are welcomed at no extra charge provided a written notice is given to the organizer at least 3 days before the event.**

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

### **You'll leave the Seminar knowing .....**

- ✓ How will your legacy be remembered & distributed?
- ✓ How can your assets be preserved for your beneficiaries across multiple generations?
- ✓ What will happen to your loved ones if something happens to you?
- ✓ Why you need to know about advantages of the appointment of Corporate Trustees in your Will?
- ✓ How to plant your wealth for your financial future?  
.....And many more

Organized by:



In collaboration with:



**MESSRS JOSHUA & ASSOCIATES**

Endorsed by:



(Pacific Trustees Berhad – Corp member of FPAM)