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18th January 2013  
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# Servicing Private Clients from High Growth Economies

*Identifying the New Frontiers & Relevant Structures  
for the Super-Rich*



## WHY YOU SHOULD ATTEND?

### New HNWI Frontiers

- CIS
- Latvia
- Turkey
- Mongolia
- Vietnam
- Indonesia
- Myanmar
- Nigeria
- Kenya

& Many More

### Innovative HNWI Structures

- Structuring the Global HNWI
- Guernsey Foundations
- Bahamas Executive Entity
- Fund Structures and SPVs

### PLUS Interactive Case Study Session

- Bilateral Investment Treaties
- Risk Management and more

## 15+ INTERNATIONAL SPEAKERS INCLUDING:

- Ashley Crossley  
**BAKER & MCKENZIE**
  - Liz Henson  
**PwC**
  - Paul Knox  
**JP MORGAN**
  - Andrew Law  
**IPG**
  - Stephen Tricks  
**CLYDE & CO**
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**BAKER & MCKENZIE**
  - Jon Digby-Rogers  
**INVESTMENT CAPITAL LTD**
  - Joseph Field  
**WITHERS**
  - Guy Paterson  
**STANHOPE CAPITAL**
  - Manish Singh  
**CROSSBRIDGE CAPITAL LLP**
  - Ewout Langemeijer  
**CORPAG GROUP**
  - Abdulkhamid Muminov  
**PwC**
  - Heather Thompson  
**HIGGS & JOHNSON**
  - Ken Stevens  
**LEOPARD CAPITAL**
  - Kerem Turunç  
**TURUNÇ**
  - Russell Clark  
**CAREY OLSEN**
- And Many More...

*"Very good presentations...I learnt a great deal"*  
(Daniel Schmid, Kendris)

12th March 2013, Grange City, London

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Dear Private Client Practitioner,

*“Economies should no longer be called emerging,  
but rather growing”*

Jim O’Neill, Goldman Sachs, 2012

There has been a fundamental shift in the way the global economy has changed; no longer can private client practitioners stay away from new and exciting markets.

This new conference aims to showcase these new frontiers for HNWI growth and the innovative structures that can be used to aid old and new clients alike for investment, succession and portfolio growth.

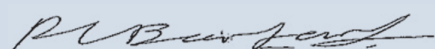
## Programme Highlights for 2013

- Mongolia: Stepping onto the Big Stage
- Scramble for Africa – Structuring for the African Wealthy
- The Alternative Asian Tigers – Understanding the Growth of Myanmar, Indonesia & Vietnam
- Revolution! The CIS States – Kazakhstan, Turkmenistan & Uzbekistan
- Building a Strong Foundation
- Understanding the Bahamas Executive Entity (BEE)

As you can see from the above overview, you will not find a more topical and complete update on high growth economies and the new HNWI population.

We look forward to welcoming you to the conference in March.

Kind regards



**Paul Barford**

Senior Conference Producer – Private Client  
IBC Conferences

## Who Should Attend?

This conference is recommended for all personnel involved with private clients and private wealth (whether new to the industry or whose areas of responsibility have increased).

Private Client Lawyers • Private Client Accountants  
Heads of Wealth Management • Heads of Private Banking  
Family Office Professionals • Investment Advisors and Financial Planners  
Heads of Wealth Products • Investment Managers and Analysts

12th March 2013

09:00 Registration & Coffee

09:30 Opening Remarks from Conference Chair  
**Ashley Crossley, BAKER & MCKENZIE**

## Theme 1: WHAT ARE THE NEW FRONTIERS FOR HNWIs?

09:40 **The Sustainability of High Growth Economies**

- High growth economies - an introduction
- Understanding emerging market client attitudes to:
  - multi asset classes
  - alternative investment
  - structured products
- Opportunities and differences between key high growth economies
- What is driving demand amongst HNWI/UNHW's in these territories?
- Does the US fiscal cliff pose a great threat to investors from high growth economies?

**Manish Singh, CROSSBRIDGE CAPITAL LLP**

10:10 **Mongolia: Stepping onto the Big Stage**

- The 'steel link' with China – mining for wealth in Mongolia
- Wealth management structures that work
- Future tax treaties and local investment opportunities
- Offshore structures and future growth of HNWI population

Moderated by:

**Stephen Tricks, CLYDE & CO**

Panel:

**Jon Digby-Rogers, INVESTMENT CAPITAL LTD**

**Abdulkhamid Muminov, PwC**

10:50 **Scramble for Africa – Structuring for the Wealthy**

- Creating Wealth from opportunities in Africa's largest markets
- Using trust structures for international planning
- Political stability
- Compliance and transparency strategy
- Investment protection strategies

**Ross Osborn, BARCLAYS**

11:20 Coffee & Networking

11:40 **The Alternative Asian Tigers of Myanmar, Indonesia and Vietnam**

- Domicile and Residence practicalities for the ASEAN free trade market
- Implications on global Vietnamese/Indonesian families and family businesses with ties and assets in the USA
- Cross border estate planning for the multinational family
- Latest tax treaties and estate planning implications
- What are the laws with regard to succession and inheritance?
- Real Estate Investment and REIT structures
- Use of trusts in the regions
- Myanmar...is it now open for business?

Moderated by:

**Joe Field, WITHERS**

Panel:

**Ken Stevens, LEOPARD CAPITAL**

Representative from **Indonesia/Vietnam**

- 12:30 **Revolution! The CIS States – Turkmenistan, Kazakhstan & Latvia**
- Kazakhstan – structuring for local assets
  - Use of Cayman and fund structures for Kazakhstan
  - Real estate advantages for the CIS with Austria, Netherlands & Curacao
  - Turkmenistan and the centralisation of wealth
  - New Russian protocols with Cyprus and the Netherlands
  - Key structures and use of asset protection for succession
  - Understanding Latvia and the new private wealth market and private bank explosion
- Salpy Kouyoumijian, BAKER & MCKENZIE**

13:20 Lunch & Networking

## Theme 2: WHAT ARE THE NEW STRUCTURES FOR HNWI's?

- 14:30 **Structuring the Global HNWI**
- Investment strategies
  - Bilateral investment treaties
  - PTCs, SPVs and other alternatives
  - Risk management
  - Structuring considerations for local assets
- Moderated by:  
**Ashley Crossley, BAKER & MCKENZIE**
- Panel:  
**Liz Henson, PwC**  
**Paul Knox, JP MORGAN**  
**Guy Paterson, STANHOPE CAPITAL**

15:20 Coffee & Networking

- 15:40 **Turkey: The Missing BRIC**
- Tax incentives for asset management
  - Wealth management structures and the Asian/Europe link
  - Future growth in the market and political stability
- Kerem Turunç, TURUNÇ**  
**Ewout Langemeijer, THE CORPAG GROUP**

- 16:10 **The Foundation Structure in Guernsey**
- Why foundations work for civil law jurisdictions
  - Advantages of Guernsey Foundations
  - Beneficiaries interest
  - Hybrid structures with PTCs
  - Comparison of the trust versus foundation structure when under attack
  - Role of foundations structure for disenfranchised investors
- Russell Clark, CAREY OLSEN**

- 16:40 **Understanding the Bahamas Executive Entity**
- The growth of the Bahamas as a IFC
  - Key factors of the Executive Entity (EE):
    - There is no set minimum funding requirement;
    - An EE may only perform its functions in relation to a trust or other entity established in or regulated by the laws of a jurisdiction
    - The EE may have a flexible governance structure consisting of officers and/or a council.
  - How it compares to other structures?
- Andrew Law, IPG**  
**Heather Thompson, HIGGS & JOHNSON**

17:10 Chairman's Closing Remarks & Drinks Reception



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*"An interesting mix of topics with political, tax & financing issues for a wide range of clients"*

(Dawn Goodman, Withers)



# Servicing Private Clients from High Growth Economies

12th March 2013, Central London

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## WHEN AND WHERE

FKW52538  
12th March 2013

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