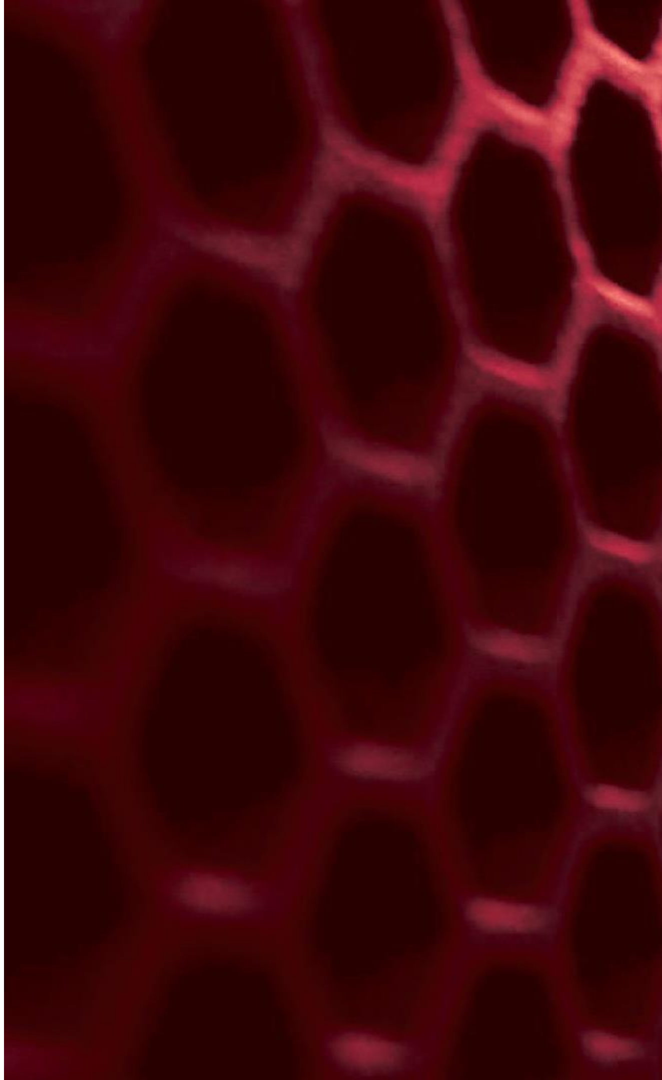
First in Asia Pacific.

2025 Asia Pacific Wealth Management Symposium

11 March, Hong Kong | 13 March, Singapore

Updated as of 5 March 2025

Short agenda



About the event

Baker McKenzie is pleased to invite you to our **2025 Asia Pacific Wealth Management Symposium** in **Hong Kong on Tuesday, 11 March** and in **Singapore on Thursday, 13 March**. This event is designed for wealth management professionals, including trustees, wealth and estate planners, and private bankers who assist high-net-worth families with their asset management and succession planning.

This symposium will feature our Baker McKenzie lawyers from across Asia Pacific, Europe, and the US, ensuring diverse and insightful discussions on key issues, challenges, and opportunities relevant to family offices and private wealth-owning structures. During the symposium, our wealth management experts will discuss the latest and most significant trends and developments in Australia, Mainland China, Hong Kong, Indonesia, Japan, Korea, Malaysia, Philippines, Singapore, Taiwan, and Thailand, as well as in the UK and the US. Attendees will have the opportunity to engage with our experts on current jurisdictional developments and gain valuable insights to navigate the evolving landscape of wealth management.

In addition to these discussions, it is noteworthy that today's high-net-worth families are increasingly visionary about building family offices that are well integrated with their planning goals and multi-jurisdictional structures. To help you navigate the intricacies of modern family office planning, including the choice of jurisdictions and vehicles, structures, and substance considerations, this symposium will feature a session on the unique opportunities of establishing and managing family offices in the region and beyond. Our experts will share how you can build best-in-class family office structures worldwide.

Furthermore, we will delve into the future of wealth management with our session on key wealth management trends and developments to watch in 2025 and beyond. Our speakers will consider the impact of geopolitical risks, sanctions in an uncertain world, global minimum taxes, and other factors on wealth management amidst significant change and instability.

We look forward to seeing you at the symposium!

For conference inquiries or to request one-on-one meetings, please contact:

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Agenda – Hong Kong

Tuesday, 11 March 2025

09:30 am – 10:00 am	**Registration**
10:00 am – 10:10 am	**Welcome Address**

Pierre Chan
Partner, Hong Kong

10:10 am – 11:10 am **Regional Updates – Part 1**

In this session, our panel of highly experienced wealth management practitioners from Asia Pacific, Europe, and the US will provide insights into the most significant developments around the world and how they may impact, among others, succession planning, family offices, trusts, and estate structuring.

Moderator

Pierre Chan
Partner, Hong Kong

Speakers:

Francis Santayana
Associate, Australia

Ryutaro Oka
Partner, Japan

John Kwak
Partner, Korea
Baker McKenzie KLP JV

Adeline Wong
Asia Pacific Tax Chair

Dawn Quek
Principal, Singapore

Panya Sittisakonsin
Partner, Thailand

Rodney Read
Partner, United States

Agenda – Hong Kong

Tuesday, 11 March 2025

11:10 am – 11:30 am **Coffee Break**

11:30 am – 12:30 pm **Regional Updates – Part 2**

As a continuation from Part 1, our panel of highly experienced wealth management experts will share their insights on the most significant developments across key jurisdictions in Asia Pacific and beyond.

Moderator

Pierre Chan
Partner, Hong Kong

Speakers:

Jason Wen
Senior Tax Consulting Director, China
Baker McKenzie FenXun

Ria Muhariastuti
Senior Tax Specialist,
HHP Law Firm, Indonesia

Kristine Mercado-Tamayo
Partner, Philippines
Quisumbing Torres

Peggy Chiu
Partner, Taiwan

Phyllis Townsend
Partner, United Kingdom

12:30 pm – 2:20 pm **Lunch**

Agenda – Hong Kong

Tuesday, 11 March 2025

2:20 pm – 3:20 pm

Family Office Planning in the 21st Century – Jurisdictions, Choice of Vehicles, Structures, Substance

A key element of modern wealth management is building family offices that are well integrated with the family's planning goals and multi-jurisdictional structures. This is essential for uniting the family, achieving seamless succession planning, safeguarding legacies, and ensuring prosperity across generations.

Join us for this insightful session on family office planning, where our experts will explore the unique opportunities of establishing and managing family offices in Hong Kong, Malaysia, Singapore, the UAE, the UK, and the US, as well as discuss significant tax developments and challenges, such as Pillar Two. Our experts will guide you on how to leverage these insights to build best-in-class family office structures worldwide.

Moderator

Lisa Ma
Special Counsel, Hong Kong

Speakers:

Enoch Wan
Senior Associate, Singapore

Edmund Yee
Associate, Malaysia
Wong & Partners

Phyllis Townsend
Partner, United Kingdom

Rodney Read
Partner, United States

3:20 pm – 3:40 pm **Coffee Break**

Agenda – Hong Kong

Tuesday, 11 March 2025

3:40 pm – 4:25 pm

What's Next? Key Wealth Management Trends and Developments to Watch – Part 1

Given the confluence of geopolitical risks, sanctions in an uncertain world, OECD pressures on base minimum taxation, and the increased need for governments to find revenue wherever they can, one should carefully consider their next move, as it may be their last or the next move may be very difficult.

In this session, we will share reflections on the future of wealth management planning amidst significant change and instability, and explore potential responses.

Marnin Michaels
Partner, Switzerland

4:30 pm – 5:00 pm

What's Next? Key Wealth Management Trends and Developments to Watch – Part 2

Building on and inspired by the insights from Part 1, our panel of experts will explore how some trends and developments might unfold, providing you with further insights into the evolving landscape.

Moderator

Marnin Michaels
Partner, Switzerland

Speakers:

Pierre Chan
Partner, Hong Kong

Dawn Quek
Principal, Singapore

Michael Wong
Special Senior Consultant, Taiwan

Matthew Legg
Partner, United Kingdom

Agenda – Hong Kong

Tuesday, 11 March 2025

5:00 pm – 5:15 pm	**Closing Remarks**  **Pierre Chan** Partner, Hong Kong
5:15 pm – 6:30 pm	**Drinks Reception**

Agenda – Singapore

Thursday, 13 March 2025

09:30 am – 10:00 am **Registration**

10:00 am – 10:10 am **Welcome Address**

Dawn Quek
Principal, Singapore

10:10 am – 11:10 am **Regional Updates – Part 1**

In this session, our panel of highly experienced wealth management practitioners from Asia Pacific, Europe, and the US will provide insights into the most significant developments around the world and how they may impact, among others, succession planning, family offices, trusts, and estate structuring.

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Partner, Japan

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Partner, Korea
Baker McKenzie KLP JV

Adeline Wong
Asia Pacific Tax Chair

Pamela Yeo
Associate, Singapore

Panya Sittisakonsin
Partner, Thailand

Rodney Read
Partner, United States

Agenda – Singapore

Thursday, 13 March 2025

11:10 am – 11:30 am	**Coffee Break**
11:30 am – 12:30 pm	**Regional Updates – Part 2**
12:30 pm – 2:20 pm	**Lunch**

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Agenda – Singapore

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Coffee Break

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Baker McKenzie delivers integrated solutions to complex challenges.

Complex business challenges require an integrated response across different markets, sectors and areas of law. Baker McKenzie's client solutions provide seamless advice, underpinned by deep practice and sector expertise, as well as first-rate local market knowledge. Across more than 70 offices globally, Baker McKenzie works alongside our clients to deliver solutions for a connected world.

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