



Thursday, 5 October 2023

08:00 - 09:00 Registration & light breakfast

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09:00 - 09:10 Chairman Opening Remarks

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09:10 - 10:00 **Panel Discussion: The Family Business: Managing Relationship Dynamics, Understanding the Rising Generation and Dealing with Transition**

FAMILY DYNAMICS

GOVERNANCE

- A look at family dynamics. How can we improve the patterns of relationships between family members? What effect does this have on our business?
- Developing trust and promoting communication between family and nonfamily members. How to build a robust and effective governance structure?
- Investing in the rising generation. Understanding their experience and alleviating the pressures they face. How can they prepare for a role in the business?
- Dealing with change. Managing the transition process.

Moderator:

[Professor Winnie Qian Peng](#), Director of Roger King Center for Asian Family Business and Family Office, [HKUST](#)

Panellists:

[Dato' Loy Teik Ngan](#), Chairman, [FBN Asia](#), Executive Chairman, [Taylor's Education Group](#) (FB)

[Yong Yoon Li](#), Managing Director, [Royal Selangor International](#) (FB)

[Linda Lam](#), Founder, [Royan Jade](#), 3<sup>rd</sup> Generation Leader, [Wing Cheung Jewellery & Jade Co.](#) (FB)

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10:00 - 10:30 **Fireside Chat: Leading with Purpose: The Journey of The Yeh Family Philanthropy**  
[Yvette Yeh Fung](#), Chair, [The Yeh Family Philanthropy](#)

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10:30 - 11:00 **Keynote Interview: Establishing a Family Office in Asia: Comparative Analysis and Considerations of Key Jurisdictions in the Region**

STRUCTURING

- **Navigating Regulatory Landscapes:** A comparison of the regulatory frameworks governing family offices in various jurisdictions in Asia, with an emphasis on Hong Kong and Singapore.
- **Geographic Considerations:** Discussing factors such as proximity to investment opportunities, cultural compatibility, time zones, and ease of doing business.
- **Talent and Expertise:** Assessing the availability of skilled professionals and service providers in each jurisdiction.
- **Tax Implications:** Comparing the tax regimes and analyzing their impact on operations and wealth preservation.

Moderator:

[Ada Ma](#), Partner, [EY](#)

Interviewee:

[David Chong Kok-Kong](#), Founder & President, [Portcullis Group](#)

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11:00 - 11:30 **Networking Break / One-to-One Meetings**

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11:30 - 12:10 **Panel Discussion: Constructing a Family Office Portfolio in 2023: Trends and Investment Strategies to Consider During Turbulent Times**

PUBLIC MARKETS

PRIVATE MARKETS

- Adapting portfolios to the changing market landscape: Strategies for current market conditions.
- Private markets vs. public markets. Comparing asset classes and risk appetite.
- Macro perspectives: Analysing the macroeconomic and geopolitical outlook and its effect on family office portfolios. What does the future hold?
- Lessons learned. What strategies can we take as a family office to mitigate risk and ensure wealth preservation. Key takeaways from the panel members.

Moderator:

[Sharnie Wong](#), Senior Research Analyst, [Bloomberg Intelligence](#)

Panellists:

[Aradhna Dayal](#), Chief Investment Officer, [Regal Ford Asia](#) (SFO)

[Yogiraj Nadgouda](#), Director, [RDA Investments Singapore](#) (SFO)

[Thomas Vergnaud](#), Co-CIO, [SBL Capital](#)

[Helen Wong](#), CEO, [Lapis Global Limited](#)



Thursday, 5 October 2023

**12:10 - 12:30** **Keynote Presentation: Asian Special Situations Opportunities for Family Offices**  
**Jenny Sun**, Founder & CIO, BMBC, Income Value Fund, **Blue Mountain Bridge Capital**  
**Raymond Chan**, Chairman & CIO, BMBC Opportunities Fund, **Blue Mountain Bridge Capital**

**12:30 - 12:40** **Lunch Sponsor Welcome Remarks**  
**Angel Low**, Managing Partner, **Growth Charger**

**12:40 - 14:00** **Networking Lunch**

**14:00 - 14:40** **Panel Discussion: From Seed to Scale: Navigating Venture Capital**

VENTURE CAPITAL

CO-INVESTMENTS

- **The Global VC Landscape:** Analyzing the distinctive attributes of the venture capital ecosystem in Asia and its comparison to other regions worldwide.
- **Accessing the Right Deals:** Strategies & best practices for family offices to access the right investment opportunities in the highly competitive venture capital space.
- **The Power of Collaboration:** The importance of building relationships with other family offices and asset managers for sourcing deals and co-investing.
- **Geographical Markets:** Identifying the geographic markets in Asia that offer attractive investment opportunities for family offices in the venture capital domain.
- **Thriving Industries and Emerging Trends:** Analyzing the sectors and industries within Asia's venture capital landscape that capture the interest of family offices.

Moderator:

**Simon Hopkins**, Chairman, **East West Private Wealth (MFO)**

Panellists:

**Rebekah Woo**, CEO & CIO, **Serene Group of Companies (SFO)**

**Kelvin Liu**, Managing Director, **Tsangs Group (SFO)**

**Nao Murakami**, Founder & General Partner, **Incubate Fund Asia**

**Katalin Gallyas**, Managing Director, **c\*funds**

**14:40 - 15:00** **Keynote Presentation: Emerging Venture Markets: Why Now?**  
**Tushar Roy**, Investment Partner, **Square Peg**

**15:00 - 15:40** **Panel Discussion: Technology, Innovation & Investment**

VENTURE CAPITAL

PRIVATE EQUITY

TECHNOLOGY

- **The Rise of AI:** How is artificial intelligence (AI) reshaping traditional industries and what are the potential benefits, challenges, and ethical considerations associated with AI implementation?
- **Disruptive Technologies:** How are other technologies impacting the world we live in today? A look at blockchain, Internet of Things (IoT), augmented reality (AR), and virtual reality (VR).
- **The Fourth Industrial Revolution:** Understanding the concept of the Fourth Industrial Revolution and how investors can identify and evaluate startups and growth-stage companies driving the Fourth Industrial Revolution.
- **Impact & Sustainability:** Discussing the role of technology in addressing global challenges.

Moderator:

**Mohamed Badr**, Summit Chair & MC, **Alea Global Group**

Panellists:

**Rachel Lau**, Managing Partner, **RHL Ventures (MFO)**

**Nydia Zhang**, Investment Director, **Ferretto Capital (SFO)**

**Carman Chan**, Founder & Managing Partner, **Click Ventures**

**Bowie Lau**, Founding Partner, **True Global Ventures**

**15:40 - 16:00** **Networking Break / One-to-One Meetings**

**16:00 - 17:00** **Roundtable Discussions**

**Table 1: Asia-Pacific Private Debt - The Winning Formula for Investors and Borrowers**  
**Roger Moh**, Managing Director & Head of Capital Solutions, **VI Asset Management**

**Table 2: Navigating Private Market Investments in China & Asia: The VMS Perspective**  
**Elton Cheung**, Partner, **VMS Group**



Thursday, 5 October 2023

17:00 - 17:30 Networking Break / One-to-One Meetings

17:30 - 18:10 **Panel Discussion: Web3 Unwrapped: A Family Office Perspective**

WEB3

DIGITAL ASSETS

BLOCKCHAIN

- The future of Web3: What are the long-term implications of Web3 for the economy, society, and culture? How will Web3 change the way we interact with the internet, with each other, and with the world around us?
- Investment: Recognizing the diverse range of investment opportunities within the Web3 ecosystem. A look at blockchain technology, smart contracts, cryptocurrency and more. How should new investors enter the space?
- What are the potential risks associated with investment in Web3?
- Lessons learned: Gain insights into the investment journeys and challenges faced by our expert panel. Extract valuable lessons as a newcomer in the Web3 investment arena.

Moderator:

[Beryl Li](#), GP, [YGG Ventures](#)

Panellists:

[Hampton Tao](#), Investment Manager, [New Heritage Investments Limited](#) (SFO)

[Dylan Hunzeker](#), Chief Strategy Officer, [Topl](#)

[Jehan Chu](#), Co-Founder, Managing Partner, [Kenetic](#)

18:10 - 21:00 Cocktail Reception & Gala Dinner

Friday, 6 October 2023

08:00 - 09:00 **Registration & light breakfast**

09:00 - 09:40 **Panel Discussion: Unleashing the Power of Impact Investing: Building a Sustainable Future**

IMPACT INVESTING

PHILANTHROPY

- Sharing the inspiring stories of our panel who have embraced impact investing, discussing their motivations, challenges, and successes, and a look into what impact means for each of them.
- Exploring innovative approaches to incorporate purpose into our businesses, investments, and philanthropy portfolios. How can we align financial goals with social and environmental impact?
- What hurdles are we likely to face in our impact investing journey and how can these be overcome? A look at greenwashing and impact measurement.
- Family offices are catalysts for change. A look at the collaborative opportunities we can leverage, and the role we play in shaping the impact investing ecosystem in Asia.

Moderator:

[Mohamed Badr](#), Summit Chair & MC, [Alea Global Group](#)

Panellists:

[Guneet Banga](#), Executive Director, [The Caravel Group](#) (FB)

[Simon Hopkins](#), Chairman, [East West Private Wealth](#) (MFO)

[Hui Hsing Ma](#), Co-Founder, [Blue7](#) (SFO)

09:40 - 10:00 **Keynote Interview: The Circular Economy and Conscious Capital: A Family Office's Journey into Sustainable Fashion and Consumer Goods**

[Vishal H. Kewalramani](#), Founder, Chairman & CEO, [The Valkin Group](#) (SFO)

In this interview we sit down with Vishal H. Kewalramani of The Valkin Group, as he shares insights into how his family office champions sustainable fashion and consumer goods. Explore The Valkin Group's journey into the circular economy, uncovering their investment strategies, challenges faced, and the wider implications for impact-focused family investments.



Friday, 6 October 2023

10:00 - 10:40

**Panel Discussion: Farm to Fork: Building Resilient Food Systems for a Changing World**

IMPACT INVESTING

FOOD

- **The Global Food Challenge:** How can we meet global food demands sustainably? A look at the role of regenerative agriculture, sustainable farming practices, and reduction of food waste.
- **Food Innovation:** What new technologies are being developed in the industry and how will these innovations impact sustainability, efficiency, and consumer preferences?
- **Alternative Farming:** A look at the potential of vertical farming, hydroponics, and indoor agriculture in addressing land and resource constraints.
- **Investment:** An exploration of the investment opportunities across the food value chain, including agriculture, distribution, packaging, and food technology.

Moderator:

[Gurdeep Prewal](#), Co-Founder & General Partner, [Rocana Ventures](#)

Panellists:

[Jean-Yves Chow](#), Managing Director Asia, [Creadev](#) (SFO)

[Mohammad Al Duaij](#), CEO, [Alea Global Group](#) (SFO)

10:40 - 11:20

**Panel Discussion: Reshaping Real Estate Investments in Dynamic Urban Landscapes**

REAL ESTATE

ESG

- **The Shifting Real Estate Landscape:** How are changes in lifestyle and work patterns reshaping cities. A look at the impact of remote work and evolving urban preferences etc.
- **Urban Revitalization and Regeneration:** A look at the potential of repurposing underutilized properties to align with evolving lifestyle trends and community needs.
- **Implications for Investors:** A discussion on the strategies we can utilise to identify and capitalize on emerging investment opportunities, such as mixed-use developments, flexible workspaces, and property conversions.
- **Sustainability and ESG:** Uncovering the value of ESG in real estate: sustainability initiatives, green certifications, and community engagement for long-term asset attractiveness.

Moderator:

[Patrick Wong](#), Senior Analyst APAC Real Estate & Head of Bloomberg Intelligence, [Bloomberg Intelligence](#)

Panellists:

[Anson Chan](#), Chairman & CEO, [Bonds Group of Companies](#) (FB)

[Ariel Shtarkman](#), Managing Partner, [Undivided Ventures](#)

[Thierry Tea](#), Vice President, [OCIC Group](#) (FB)

11:20 - 11:40

**Keynote Presentation: Lead Real Estate Co.,LTD**

11:40 - 12:20

**Panel Discussion: Healthcare Investments as a Family Office**

- **Evolving Healthcare Landscape:** How has the healthcare industry evolved in recent years, and what are the key trends shaping its future?
- **Investment Strategies:** Examining different investment strategies within the healthcare sector, including direct investments, venture capital, private equity, and strategic partnerships.
- **Collaboration and Co-Investment:** Discussing the benefits and challenges of collaboration and co-investment among family offices and asset managers in the healthcare sector.

Moderator:

[Elton Cheung](#), Partner, [VMS Group](#)

Panellists:

[Richard Tao](#), Chairman, [New Heritage Investments Limited](#) (SFO)

[Johnson Ng](#), Partner, [Camtech Holdings](#) (SFO)

[Dr. Alan Chang](#), Founder and CEO, [Taron Solutions](#)

[Betty Wong](#), Director of Corporate Strategies & Business, [Jacobson Pharmaceuticals](#)

12:20 - 12:50

**Keynote Presentation: Generational Gems: Building a Sustainable Legacy Beyond Family Wealth**

[Sophie Khau](#), Managing Director, [Mastery Holdings](#) (SFO)

[Sylvie Khau](#), Managing Director, [Mastery Holdings](#) (SFO)

12:50 - 13:00

**Chairman Closing Remarks**

13:00 - 14:00

**Closing Networking Lunch**