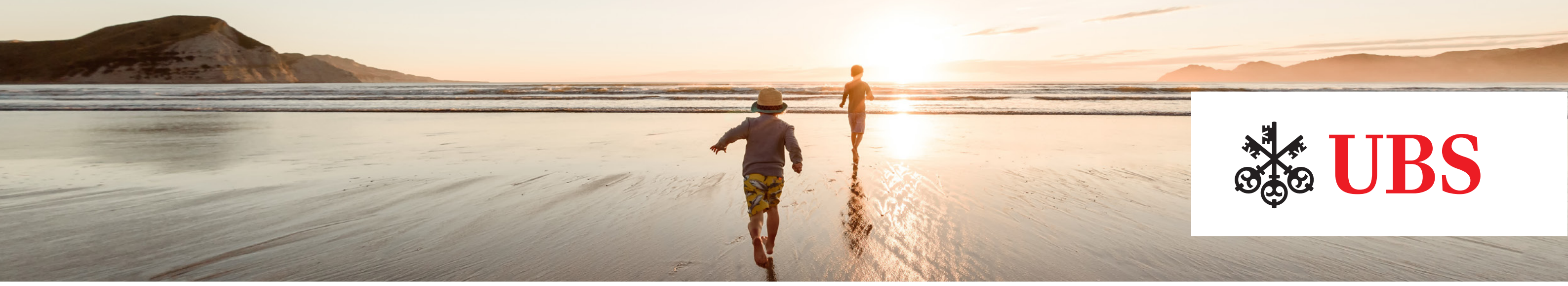
Forging legacies, impacting generations

UBS Singapore Family Office Forum 2023



UBS

Friday, 7 July 2023

08:00 – 09:00	**Registration & light breakfast**
09:00 – 09:10	**Opening address** **Edmund KOH,** Member of the UBS Group Executive Board, President UBS Asia Pacific of UBS Group AG & UBS AG
09:10 – 09:25	**Keynote address** **HENG Swee Keat,** Singapore Deputy Prime Minister & Coordinating Minister for Economic Policies
09:25 – 09:40	**Navigating the road ahead** The first half of the year has delivered many pivotal turning points for global investors. The Federal Reserve's tightening cycle is likely at its peak, China's consumer-led recovery remains on track, and Asia's economy has found its bottom. Meanwhile, the US and Europe continue to grapple with recession risks as unforeseen shocks, from banking turbulence to the US debt ceiling saga, surface along the way. In this session, we look ahead to the trends, opportunities, and pitfalls shaping a critical second half and how family offices could navigate ahead. **Bhanu BAWEJA**, Chief Strategist, UBS Investment Bank
09:40 – 10:05	**Private equity investments: Delivering value by building a balanced portfolio** Private equity is a powerful asset class which has the unique feature that takes the long view. The managers can access an opportunity set that is significantly broader than the public equities ecosystem. According to the UBS Global Family Office Report 2023, faith in illiquid assets has remained strong, as two thirds of family offices believe that illiquidity continues to boost returns. Private equity investing had the wind behind their backs for multi-decades given the low interest rate environment. With rising interest rates, will the private equity investing playbook remain the same? In this session, we will hear from Joseph Bae on his views about the private equity investment landscape, thoughts on investing in Asia and the strategies used to work through the challenging market environments while delivering long term value to investors. **Joseph BAE**, Co-Chief Executive Officer, KKR **Moderated by:** **Bhanu BAWEJA**, Chief Strategist, UBS Investment Bank
10:05 – 10:25	**Coffee break**

Friday, 7 July 2023

10:25 – 10:55	**Does private credit still make sense in a world of 5% risk-free rate?**

Once considered an exclusive domain for institutional investors, private credit has become increasingly popular among private clients, and now forms an integral part of many investors' investment portfolios. But with the surge in interest rates and the recent turmoil in the banking sector, the global credit markets are now facing some of the tightest financial conditions since 2009, leading to concerns about a pending recession in the coming quarters.

How will tighter lending standards and a weaker economic outlook impact the private credit market? With short-term risk-free rates above 5%, does it still make sense to invest in private credit – a market that's perceived as lacking in liquidity and transparency? Or will the disintermediation of banks and the rise in risk premium create even more opportunities for private credit investors?

Andrew DAVIES, Managing Partner & Co-Head of Private Credit, CVC
Baxter WASSON, Co-Head of Capital Solutions, UBS O'Connor
Gaurav PARASRAMPURIA, Managing Director and Co-Head of Asia, Oaktree Capital Management

Moderated by:
Tommy LEUNG, Co-Head Global Family and Institutional Wealth, APAC, UBS Global Wealth Management

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10:55 – 11:00 **Real assets**

A feature on Brookfield Oaktree Wealth Solutions.

11:00 – 11:30 **Seeking Alpha and navigating uncertain market**

Hedge funds have always been a key component of an 'alternatives' portfolio for any institutional asset allocator. The objective is always clear: seek uncorrelated but higher returns (per unit of risk) as compared to public markets. But can hedge funds do well in all market environments by flexibly shifting their positioning as they navigate through market turbulences? Is there a standout strategy in hedge funds (such as multi-strategy, equity long short, relative value, macro trading or event driven) that investors should focus on now? Does manager selection matter in the world of hedge funds? In this session, we will hear from seasoned hedge fund practitioners on how they focus on alpha generation consistently amid turbulent markets.

Brian FRIEDMAN, Head of Macro Strategy, Brevan Howard Investment Management
Christopher G. KIRK, President of Alternative Investments & Management Funds US,
Co-Head of Alternatives & Multi-Strategy Product Management, Wellington Management
Eric TO, Co-Head of APAC, Schonfeld Strategic Advisors

Moderated by:
Adolfo OLIETE, Head of Research & Head of Asia-Pacific Investments, Hedge Fund Solutions,
UBS Asset Management

11:30 – 13:00 **Lunch & networking**

13:00 – 13:20 **Built for generations: Future proofing your family office**

"The first generation creates the wealth, the second generation stewards it and the third generation spends it". This saying common in many cultures, highlights the risk of wealth not lasting more than three generations. A family office can be a key differentiator, acting as a vehicle for creating a lasting family legacy and financial success. Is it simply setting up a family office or is there more to ensure lasting legacies for generations?

Matthew NORMAN, Chief Investment Officer, Kenjiro Private Office

Moderated by:
TAN Lay Peng, Head, Family Advisory & Family Office Competence Centre SEA, UBS Global Wealth Management

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Friday, 7 July 2023

13:20 – 14:00

Breakout 1

How do business families preserve family wealth, values, purpose & legacy through the family office?

Succession stresses amongst family business are universal – who will lead and how, the concern on impact of dilution of ownership and control on the Family Office. In this session, we will explore how family office can be used as "glue" to keep a business family together after a monetization event and intergenerationally. Using the family office as an enabler to define family purpose and mission, professionalize the management of the family's wealth, turning family values into new ventures, embedding strategic philanthropy and impact investing, incubating portfolio entrepreneurship in the next-generation and merging traditions with innovation.

Dr. Maren SCHWEIZER, Chief Executive Officer, Schweizer World Group, Singapore
Dr. Marta WIDZ, Educator, Researcher & Advisor for Family Businesses & Family Offices
KWEE Ker Fong, Principal, Kwee Investment Office
Matthew NORMAN, Chief Investment Officer, Kenjiro Private Office

Moderated by:
Catherine CHOW, Senior Family & Family Office Advisor, Family Advisory Southeast Asia, UBS Global Wealth Management

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13:20 – 14:00

Breakout 2

Is integrating the next generations the answer to ensuring lasting family legacies?

Succession and legacy planning is one of the top priorities of most UHNW families. Yet, in the UBS Global Family Office Report 2023, only 42% of our respondents have succession plans for the family and an even smaller 26% have succession plans for the family office. In this session we will explore how the next generations are integrating into family businesses and family offices and the impact they are making. We will discuss what legacies mean for the next generation, and their measure of success and impact when shaping their family legacies.

Darren TEO, Managing Partner, Apricot Capital
Elaine TEO, Managing Partner, Apricot Capital
Michael AKMAN, Chief Operating Officer, Hinrich Foundation
Sabrina CHONG, Director & Head of Corporate Development, Luxasia Group

Moderated by:
Michelle LAU, Head of Wealth Planning SEA, Advisory & Sales, UBS Global Wealth Management

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Friday, 7 July 2023

14:10 – 15:30 **Concurrent small group meetings**

Session 1: **14:10 – 14:30**

Session 2: **14:40 – 15:00**

Session 3: **15:10 – 15:30**

Each guest will be able to meet with 3 managers in 3 sessions of small group meetings. Please work with your Client Advisor to select 3 managers of your choice (list below). Each small group meeting has a limited capacity and is on a first come, first served basis.

List of managers:

Apollo Global Management
Jonathon ORR, Managing Director,
Client and Product Solutions

Bain Capital
Barnaby LYONS, Global Co-Head of Special Situations
Cécile BELAMAN, Partner

Brevan Howard Investment Management
Daniel HILL, Product Specialist & Marketing

Brookfield Oaktree Wealth Solutions
Daniel CHENG, Managing Director, Infrastructure,
Renewables & Transition Investing

CVC
Andrew DAVIES, Managing Partner & Co-Head of
Private Credit

Oaktree Capital Management
Gaurav PARASRAMPURIA, Managing Director & Co-Head of Asia
Lin HUANG, Senior Vice President, Marketing & Client Relations

Schonfeld Strategic Advisors
Eric TO, Co-Head of APAC

TPG Capital Asia
Ganen SARVANANTHAN, Managing Partner

UBS Asset Management
Adolfo OLIETE, Head of Research & Head of Asia-Pacific Investments,
Hedge Fund Solutions

UBS O'Connor
Baxter WASSON, Co-Head of Capital Solutions

Wellington Management
Christopher G. KIRK, President of Alternative Investments &
Management Funds US, Co-Head of Alternatives & Multi-Strategy
Product Management

Friday, 7 July 2023

Edmund KOH

Member of the UBS Group Executive Board
President UBS Asia Pacific of UBS Group AG & UBS AG

09:00 – 09:10	**Opening address**

Edmund Koh, a Singaporean, joined UBS in February 2012 as Group Managing Director, heading the UBS Wealth Management South East Asia and Asia Pacific Hub. He became a member of the Group Executive Board and was appointed President UBS Asia Pacific of UBS Group AG and UBS AG in January 2019. He was also Head Wealth Management Asia Pacific from 2016 – 2018 as well as Country Head Singapore from 2012 – February 2019.

Edmund oversees all the businesses across 13 locations in Asia Pacific and meets with key regulators and government officials regularly to exchange views on market and geopolitical development, and financial markets opening and policies. He has been invited to speak in various forums including the Institute of International Finance membership meeting.

Edmund is a strong advocate of talent management and community involvement. He launched the UBS Youth Finance Academy in 2014 to build the talent pipeline for Singapore's financial industry and led and advocated for the implementation of 17 projects across Asia Pacific under the UBS COVID-19 Relief Funds program which totaled USD 30 million globally in 2020.

With more than 30 years' experience in senior roles in financial services, Edmund is a board/ council member of various committees including the MAS Financial Centre Advisory Panel, the Wealth Management Institute, the Asian Bureau of Finance and Economic Research, and the University of Toronto International Leadership Council. He was also named a Distinguished Fellow by The Institute of Banking & Finance Singapore in 2017.

Edmund had also served as a Board member at the Singapore Housing Development Board for a period of 12 years from 1998 to 2010, Vice-Chairman of the Singapore Sports Council from 2002 to 2010 and Director of Singapore Totalizator Board from 1998 to 2004.

Edmund holds a Bachelor of Science in Psychology from the University of Toronto, Canada.

Friday, 7 July 2023

HENG Swee Keat

Singapore Deputy Prime Minister & Coordinating Minister for Economic Policies

09:10 – 09:25	**Keynote address**

Mr. Heng Swee Keat is Singapore's Deputy Prime Minister and Coordinating Minister for Economic Policies.

Mr. Heng chairs the tripartite Future Economy Council which oversees the on-going restructuring of Singapore's economy, through upgrading the skills of workers and transformation of industry, to create better career prospects for Singaporeans. He leads a team to oversee the design and implementation of national strategies in areas such as skills and capabilities development, innovation and productivity as well as the internationalisation of companies.

He is also the Chairman of the National Research Foundation, which sets the direction for Singapore's research, innovation and enterprise (RIE) strategies. Mr. Heng is overseeing the closer integration of Singapore's RIE and industry transformation efforts.

Mr. Heng served as Minister for Education from 2011 to 2015. He then served as Minister for Finance from 2015 to 2021, overseeing ten national Budgets including an unprecedented five Budgets to support Singaporeans and businesses through the COVID-19 pandemic in 2020.

Mr. Heng has an MA in Economics from Cambridge University. He also holds a Master in Public Administration from the Kennedy School of Government, Harvard University.

Friday, 7 July 2023

Bhanu BAWEJA

Chief Strategist
UBS Investment Bank

09:25 – 09:40	**Navigating the road ahead**
09:40 – 10:05	**Private equity investments: Delivering value by building a balanced portfolio**

Bhanu Baweja is the Chief Strategist for UBS Investment Bank. His team have been rated #1 through the last 5 years in II and Extel surveys in the EM Equity Strategy and EM Economics and Macro Strategy. Individually, Bhanu hit 3 #1s for Economics, Sovereign Debt and Equity Strategy.

Bhanu began his working life as a tutor with the Economics department at the London School of Economics.

Educated in India and the UK, Bhanu holds an MSc in Finance and Economics from the London School of Economics, a Master's in Economics from the Delhi School of Economics, and a BA (honours) in Economics from St. Stephen's College, Delhi. Bhanu is a CFA Charterholder.

Friday, 7 July 2023

Joseph BAE

Co-Chief Executive Officer
KKR

09:40 – 10:05 **Private equity investments: Delivering value by building a balanced portfolio**

Joseph Bae (New York) joined KKR in 1996 and is its Co-Chief Executive Officer. Prior to his current position, he served as Co-President and Co-Chief Operating Officer from 2017 to 2021, and he has been a member of the board of directors of KKR & Co. Inc., since July 2017. Mr. Bae has held numerous leadership roles at KKR.

He was the architect of KKR's expansion in Asia, building one of the largest and most successful platforms in the market. In addition to his role developing KKR's Asia-Pacific platform, he has presided over business building in the firm's private markets businesses, which included leading or serving on all of the investment committees and implementing the firm's modern thematic investment approach. Mr. Bae serves on the firm's Inclusion and Diversity Council.

He is active in a number of non-profit educational and cultural institutions, including co-founding and serving on the board of The Asian American Foundation, serving as a member of Harvard University's Global Advisory Council and serving as a member of the Board and Executive Committee of the Lincoln Center.

Friday, 7 July 2023

Andrew DAVIES

Managing Partner & Co-Head of Private Credit
CVC

10:25 – 10:55	**Does private credit still make sense in a world of 5% risk-free rate?**
14:10 – 15:30	**Concurrent small group meetings**

Andrew joined CVC in 2010. He is Co-Head of the Private Credit team and is based in London.

Prior to joining CVC, Andrew was at Greenwich Street Capital Partners where he was responsible for sourcing, trading, analysis, and portfolio management of assets across the capital structure.

Andrew is a graduate of the University of the Witwatersrand, Johannesburg, South Africa.

Friday, 7 July 2023

Baxter WASSON

Co-Head of Capital Solutions
UBS O'Connor

10:25 – 10:55	**Does private credit still make sense in a world of 5% risk-free rate?**
14:10 – 15:30	**Concurrent small group meetings**

Baxter Wasson is a Managing Director at O'Connor, based in New York, where he is Co-Head of O'Connor Capital Solutions.

Prior to joining O'Connor, he was employed at Deutsche Bank where he was Head of Private Credit Origination and Structuring (2007-2015).

Prior to his tenure at Deutsche Bank, Baxter worked at Latham & Watkins as a senior associate in the Finance Department focusing on leveraged finance and project finance (2004-2007). In the years preceding his time at Latham & Watkins, Baxter was an associate at Winston & Strawn in the Project Finance Group (2001-2004).

Baxter holds a J.D. from Harvard Law School and a B.A. from Dartmouth College. Baxter is also a member of the New York Board of Girls Leadership, a national non-profit dedicated to equipping girls with the social and emotional tools to find and use their voices. Baxter is also a board member of McLaren Racing Limited.

Friday, 7 July 2023

Gaurav PARASRAMPURIA

Managing Director and Co-Head of Asia
Oaktree Capital Management

10:25 – 10:55	**Does private credit still make sense in a world of 5% risk-free rate?**
14:10 – 15:30	**Concurrent small group meetings**

Gaurav, managing director and Co-Head of Asia for the Global Opportunities strategy, leads corporate-related investments across Asia while also overseeing Oaktree's India investments across asset classes for the strategy.

Prior to joining the firm in 2017, he spent five years at J.P. Morgan focusing on Asian Special Situations within the Global Markets Group. Before J.P. Morgan, Gaurav worked with Morgan Stanley's Infrastructure investment team in India.

Gaurav received an M.B.A. from the Indian Institute of Management, Bangalore and is a qualified Chartered Account and Company Secretary.

Friday, 7 July 2023

Tommy LEUNG

Co-Head Global Family and Institutional Wealth, APAC
UBS Global Wealth Management

10:25 – 10:55	**Does private credit still make sense in a world of 5% risk-free rate?**

Tommy is the Co-Head of Global Family and Institutional Wealth (GFIW), APAC. He and his team work closely with colleagues across global wealth management, investment bank and asset management to cover the billionaire clients in the region, their family offices and operating companies, offering holistic, one-bank solutions ranging from portfolio investments, wealth planning, family governance to institutional capital market solutions.

Prior to this, Tommy was the Head of Active Advisory at UBS Global Wealth Management. In his capacity as Head of Active Advisory, he was responsible for all client-facing specialists in SEA, including the Active Portfolio Advisors, Investment Consultants, Investment Funds and Alternatives Specialists. At the regional level, he also provided strategic directions and regional coordination to all the Active Portfolio Advisors in Hong Kong, Singapore, and Taiwan.

Before joining Wealth Management in 2017, Tommy spent sixteen years at UBS Investment Bank, most recently serving as the Head of Credit Sales for APAC. He was responsible for leading the firm's corporate bond and credit derivative business in the region. Earlier in his career, Tommy headed the European Credit Strategy team in London and served as a Senior Credit Derivative Trader in the United States. He started his Wall Street career in 2001, spending the first six years as a Macro Strategist.

He holds a B.A. in Political Science from the University of Chicago and is a CFA Charterholder.

Friday, 7 July 2023

Brian FRIEDMAN

Head of Macro Strategy
Brevan Howard Investment Management

11:00 – 11:30	**Seeking Alpha and navigating uncertain market**

Brian Friedman re-joined Brevan Howard in October 2022 as the Head of Macro Strategy.

Most recently, Brian was a Partner and Global Head of Market Strategy at Goldman Sachs after rejoining Goldman as the Head of US Interest Rate Swaps trading. Brian was a Senior Trader at Brevan Howard Investment Management from 2013 to 2016. From 2010 to 2013, Brian was a Managing Director in the Interest Rate Sales group at Goldman Sachs.

Brian was at Bank of America where he was Head of Product Sales in Global Corporate and Investment Banking from 2004 to 2010. Prior to this, he was a senior trader at JPMorgan Chase after starting his career at Swiss Bank Corporation O’Connor.

Friday, 7 July 2023

Christopher G. KIRK, CFA

President of Alternative Investments & Management Funds US
Co-Head of Alternatives & Multi-Strategy Product Management
Wellington Management

11:00 – 11:30	**Seeking Alpha and navigating uncertain market**
14:10 – 15:30	**Concurrent small group meetings**

Chris is the president of Wellington Alternative Investments and Wellington Management Funds US, two of the firm's fund companies that offer alternative and traditional investment strategies to clients globally. In this role, he is responsible for the business and investment oversight of these funds, including governance, product development, risk management, marketing, operations, and servicing of fund investors. He is also co-head of Alternatives & Multi-Strategy Product Management, a team that engages with clients, prospects, and consultants to discuss investment approaches, develops new products, analyzes portfolios to ensure investment integrity, and manages business issues on behalf of portfolio teams.

Chris is a member of several of the firm's management and advisory committees, including the Hedge Fund Review Group, the Multi-Strategy Review Group, the Capital Commitments Committee, the Sponsored Funds Oversight Committee, the Wellington Funds Group Investment Committee, the Wellington Funds Group Oversight Committee and the Managing Director Advisory Committee.

Prior to joining Wellington Management in 2004, Chris was a director in the investment banking division at Merrill Lynch & Co., advising financial institutions on mergers & acquisitions and capital raising transactions (1997 – 2004). Earlier in his career, he held positions at A.T. Kearney (formerly EDS Consulting/ Flater & Co., 1993 – 1995), and John Hancock Financial Services (1992 – 1993).

Chris earned his MBA from Dartmouth College (Tuck, 1997) and his BA in economics and philosophy from Boston College (1992). Additionally, he holds the Chartered Financial Analyst designation and is a member of the CFA Society Boston and the CFA Institute.

Friday, 7 July 2023

Eric TO

Co-Head of APAC
Schonfeld Strategic Advisors

11:00 – 11:30	**Seeking Alpha and navigating uncertain market**
14:10 – 15:30	**Concurrent small group meetings**

Eric is Co-Head of APAC and Head of APAC Fundamental Equity. He oversees the investment teams in Asia for Schonfeld Strategic Advisors and has been associated with Schonfeld since 2017 when he joined Folger Hill Asset Management (Hong Kong) Limited (FHAM HK). FHAM HK counted Schonfeld as its largest investor and was eventually acquired fully by Schonfeld in 2018.

Eric previously worked as an analyst at Syz & Co (Hong Kong) Ltd on their fund of fund team and also worked for Point72/SAC, Balyasny Asset Management, and Folger Hill Asset Management (HK) as part of their management team with a focus on business development.

Eric graduated from Emory University with a Bachelor of Science in Biology and minor in Economics.

Friday, 7 July 2023

Adolfo OLIETE

Head of Research & Head of Asia-Pacific Investments
Hedge Fund Solutions
UBS Asset Management

11:00 – 11:30	**Seeking Alpha and navigating uncertain market**
14:10 – 15:30	**Concurrent small group meetings**

Adolfo Oliete is a member of the HFS Management and Senior Investment Forums. He is primarily responsible for directing cross-strategy research across the team's global investment team at UBS Hedge Fund Solutions as well as supporting the CIO in portfolio management activities as a member of the portfolio management team. In addition, Adolfo leads research on markets, hedge fund investment due diligence and co-investments in Asia.

Prior to joining UBS in 2012, he spent one year as a hedge fund consultant at Casteel Capital. Before that, Adolfo worked at Highbridge Capital Management in New York and London in 1997, where he was a Senior Vice President. During his last six years there before his departure in 2009, he traded European Convertible bonds and helped manage the European Convertible bond arbitrage portfolio.

Friday, 7 July 2023

Matthew NORMAN

Chief Investment Officer
Kenjiro Private Office

13:00 – 13:20	**Built for generations: Future proofing your family office**
13:20 – 14:00	Breakout 1: **How do business families preserve family wealth, values, purpose & legacy through the family office?**

Kenjiro is the London based single family office of a family originating from Japan. The family office focusses upon a liquid multi-asset portfolio with a very long term investment horizon.

As part of his role, Matthew holds numerous company board and limited partner advisory committee positions. Matt also serves on the board of a Taiwanese family office. He has been working solely with single family offices since 2005 and his prior experiences include management roles within a London-based Brazilian family, a Russian Hedge Fund and working with Middle Eastern Sovereign Wealth Funds.

Friday, 7 July 2023

TAN Lay Peng

Head, Family Advisory & Family Office Competence Centre SEA
UBS Global Wealth Management

13:00 – 13:20	**Built for generations: Future proofing your family office**

Lay Peng heads Family Advisory and the Family Office Competency Centre at UBS AG Singapore. Lay Peng and her team support ultra-high net worth families and family offices in Southeast Asia in their wealth and legacy planning through providing insights, comprehensive advice and execution services. She and her team adopt a holistic approach to succession planning, assisting families define the purpose of their wealth, develop their shared family values and establish a multigenerational family governance framework, family constitution, setting up their family council and supporting wealth principals in designing the governance and blueprint of their family offices.

Lay Peng brings with her 29 years of banking experience to her current role and has developed services and solutions in UBS tailored to family offices in Singapore and the SEA region, such as Family Office Dialogues, Family Office Academy and Family Office Labs.

In UBS, Lay Peng has led teams focused on wealth management, business successions and family legacy planning for clients in the Indonesian market and the Global Family Office segment prior to her current role.

Prior to joining UBS, Lay Peng was with Citibank Singapore where she had various roles in treasury, treasury sales and advisory, product management and leading teams in treasury sales and relationship managers covering the Asian markets.

Lay Peng holds a Bachelor of Management Studies (1st Class) from the University of Waikato, New Zealand; Master of Science in Wealth Management from the University of Rochester and Master of Advanced Studies in Finance from the Universities of Bern. She is also a Certified Financial Planner (CFP) and an affiliate member of STEP Singapore.

Friday, 7 July 2023

Dr. Maren SCHWEIZER

Chief Executive Officer
Schweizer World Group, Singapore

13:20 – 14:00	Breakout 1: **How do business families preserve family wealth, values, purpose & legacy through the family office?**

Dr. Maren Schweizer: 6th Gen Founding-CEO of SCHWEIZER WORLD GROUP, her family's corporate venture capital and building arm with 34 portfolio companies.

She is an accomplished tech executive with 20+ years of advanced manufacturing, deep tech, and investment management. Maren has previously been CEO of her family's core business, SCHWEIZER Electronic AG, a market leader in providing innovative solutions for Mobility, Renewable Energy, and Industry Electronics.

As CEO of multiple organizations, and 10+ years specifically of leadership experience in Asia and Europe, Maren is aggressive in leading large-scale digital and business reorganizations, strategic turnarounds, and new-venture development.

She has held multiple executive Board roles for 15+ years of publicly listed companies in Germany and Japan, more recently as an active Board member of one of the largest Japanese microelectronics PCB businesses Meiko Electronics with a consolidated sales of 95B Yen and 10,000 employees. Maren has also held Group Director roles in corporate entities in multiple countries including China, Vietnam, and Singapore. She has contributed as a member of the Main Board and Financial Committee to the ZVEI, Germany's Electro and Digital Industry Association.

Dr. Schweizer serves on 5 supervisory and advisory boards around the globe, such as of HDI Global SE, a leading insurer for industrial and commercial clients in 150 countries.

Friday, 7 July 2023

Dr. Marta WIDZ

Educator
Researcher & Advisor for Family Businesses & Family Offices

13:20 – 14:00	Breakout 1: **How do business families preserve family wealth, values, purpose & legacy through the family office?**

Dr. Marta Widz is a leader with a stewardship mindset, long-term mentor of young adults and next generation entrepreneurial family members. Trained pedagogist, she is a family business professor, faculty member of several schools and universities, writer, poet, lecturer, key-note speaker and trusted advisor.

Marta embraces the worlds of family business and specializes in governance, sustainability as well as purposeful ownership and wealth. Family Capital has recognized her as Top 100 Family Influencers, and "those nominating Widz say she has made a significant impact in family enterprise across Europe, America and Asia..."

Marta has several affiliations. She is the founder of Family Silver Institute, a boutique trusted advisory for family businesses and family offices, Executive in Residence at the INSEAD Wendel International Centre for Family Enterprise, as well as Affiliated Faculty at the Family Business Institute at the Grossman Business School of the University of Vermont. She also serves as an affiliated faculty at the Wealth Management Institute (WMI), Singapore, where she previously was a leading contributor to the family office knowledge creation and dissemination at, acting as a Senior Research Fellow, and Research Director, and a key member of Global-Asia Family Office (GFO Circle) leadership team.

Marta obtained her Ph.D. at the Centre for Family Business at the University of St. Gallen, Switzerland, and was the Research Fellow at IMD Business School, Switzerland, where she worked closely with the world's most exceptional family businesses, such as Jebsen & Jessen Family Enterprise, Dachser, Pentland, De Agostini, Brown-Forman. She was a driving force of the IMD-Pictet Sustainability in Family Business Award, evaluating the sustainability strategy and credentials of family businesses such as Bel, Firmenich, Velux, J.M. Huber, Melia Hotels, Decathlon or Sodexo.

A truly global citizen, Marta is a citizen of Poland and Switzerland, and the alumna of the London School of Economics and Political Science (LSE), the UK; the Global Alliance in Management Education (CEMS); the Warsaw School of Economics (SGH), Poland; HANKEN, Finland; and IMD Business School, Switzerland. Born in the communistic Poland, she strongly beliefs in the power of will and the power of education, especially girls' education, as a pathway to advance the world.

Friday, 7 July 2023

KWEE Ker Fong

Principal
Kwee Investment Office

13:20 – 14:00	Breakout 1: **How do business families preserve family wealth, values, purpose & legacy through the family office?**

Ker Fong is the Principal of Kwee Investment Office. Since inception, Ker Fong has been involved in numerous aspects of the firm from investment structuring to portfolio management. He focuses deeply on family governance, owing to his belief that honest and intentional relationships are the key to any successful and sustainable family enterprise.

Ker Fong is also a Vice President within the Pontiac Land Group, where he leads a department focused on digital transformation and process improvement. Prior to that, he held a position in a boutique leadership consulting firm.

Ker Fong graduated with distinction from Cornell University's School of Hotel Administration. In his free time, Ker Fong volunteers as a Youth Group Leader at his local church and enjoys cooking with organic produce from his wife's regenerative farm.

Friday, 7 July 2023

Catherine CHOW

Senior Family & Family Office Advisor
Family Advisory Southeast Asia
UBS Global Wealth Management

13:20 – 14:00	Breakout 1: **How do business families preserve family wealth, values, purpose & legacy through the family office?**

Cathy has over 25 years of experience in the APAC region servicing large privately owned businesses, their family offices and wealthy families in assisting with the creation, protection and intergenerational transition of their wealth, businesses and assets.

Cathy works alongside business families, adopting a holistic approach to succession planning, assisting families define the purpose of their wealth, develop their shared family values and establish a multigenerational family governance framework. She specializes in helping families draft their decision-making framework and family constitution, setting up their family council and supporting wealth principals in designing the blueprint of their family office, including structuring of private wealth and business assets. Cathy also works with the Next Generation of business family owners to sustainably protect and grow the families' business and legacy assets as leaders and stewards for future generations.

Cathy joined UBS in 2018. Prior to relocating to Singapore, she was the Australian Deloitte Private Chinese Services Group leader serving local wealthy families and inbound private client investors from North and Southeast Asia.

Cathy is an Australian Chartered Accountant and member of Chartered Accountants Australia and New Zealand. She is also a member of the Society of Trust and Estate Practitioners (STEP) – Singapore and member of the Family Firm Institute (FFI) from Boston, Massachusetts, holding a dual Certificate in Family Business Advising and Certificate in Family Wealth Advising.

She holds a Master of Commerce from Macquarie University, Australia, Bachelor of Economics from the University of Sydney, Australia and a Diploma in Financial Planning from FINSIA (Securities Institute of Australia). Cathy is fluent in English, Chinese Cantonese and conversational in Mandarin.

Friday, 7 July 2023

Darren TEO

Managing Partner
Apricot Capital

13:20 – 14:00	Breakout 2: **Is integrating the next generations the answer to ensuring lasting family legacies?**

Darren started his career in Super Group overseeing its business planning, corporate strategy and expansion initiatives. He went on to establish Super Group's Corporate & Investor Relations team and continues to be responsible for charting the Group's overall strategy and commercial activities. In 2017, he led the strategic sale of Super Group Ltd to Jacobs Douwe Egberts, the world's second largest coffee company. His last appointment at Super Group was Executive Director.

Assuming the position of Managing Partner at Apricot Capital now, he evaluates investment proposals and manages Apricot Capital's portfolio investments. His passion for empowerment has enabled him to work closely with his portfolio companies and adapting strategies to help companies navigate the ever changing market conditions. The Family Office is particularly passionate about initiatives relating to social mobility and environmental sustainability.

Maintaining a hands-on approach, Darren also serves on the board of Apricot's portfolio and joint venture companies (such as Marco Polo Marine, Geniebook, Fundamental Foods etc). Recognizing the unique challenges faced by different businesses, he plays an advisory role offering strategic guidance that aligns with the portfolio companies' long-term goals and values.

Outside of his professional pursuits, Darren is passionate about giving back to the community. He actively engages in philanthropic initiatives, supporting causes related to education and mental wellness.

Friday, 7 July 2023

Elaine TEO

Managing Partner
Apricot Capital

13:20 – 14:00	Breakout 2: **Is integrating the next generations the answer to ensuring lasting family legacies?**

During her stint at Super Group Ltd, Elaine helmed the Group's branding, marketing and product development team. She spearheaded the rebranding exercise for the Company and played a pivotal role in building and establishing a stronger and more appealing brand for the Company. This has strengthened the Group's brand presence in key markets and enabled the Company to launch and penetrate into new markets.

In her current role as Managing Partner in Apricot Capital, Elaine is responsible for its financial planning, strategic fund deployment and management of the Company's investment portfolios. She has successfully led financial planning and analysis efforts and executed investment strategies to maximize returns for the family office.

With a passion for creativity and brand storytelling, Elaine has directed the growth of numerous consumer brands. Drawing upon her years of experience, she plays an active role in direct investments made by Apricot Capital by sharing her knowledge and helping partners elevate their brands and connect with target audiences. Elaine ensures that marketing strategies align with business objectives and deliver tangible results in revenue growth.

More recently, Elaine spearheaded the launch of Oatbedient. Newly founded in 2022, Oatbedient is our very own brand of oat milk. This product development is driven by our desire for authentically healthy products with clean labelling.

Outside of work, Elaine believes in giving back to the community by supporting philanthropic initiatives relating to humanitarian projects with a focus on addressing social issues, education and healthcare access for the marginalized populations in Singapore.

Friday, 7 July 2023

Michael AKMAN

Chief Operating Officer
Hinrich Foundation

13:20 – 14:00	Breakout 2: **Is integrating the next generations the answer to ensuring lasting family legacies?**

Michael is an investment manager and lawyer and serves as the Chief Operating Officer of the Hinrich Foundation.

Michael sits on the Foundation's investment committees and manages globally diversified, multi-asset portfolios for the Foundation and for the Hinrich family. As the Hinrich Foundation's Chief Operating Officer, Michael is also responsible for many of the day-to-day operations of the Foundation.

Michael is a second-generation member of the Hinrich family and a director of several of the family's and Foundation's companies. He also participates in the leadership of the Foundation's philanthropy programs, sitting on steering committees for the Foundation's education and research programs.

Michael has an MBA from the Hong Kong University of Science & Technology, a Juris Doctor from Georgetown University Law Center, where he graduated cum laude, and a Bachelor of Fine Arts from New York University.

Michael lives in Singapore with his family.

Friday, 7 July 2023

Sabrina CHONG

Director & Head of Corporate Development
Luxasia Group

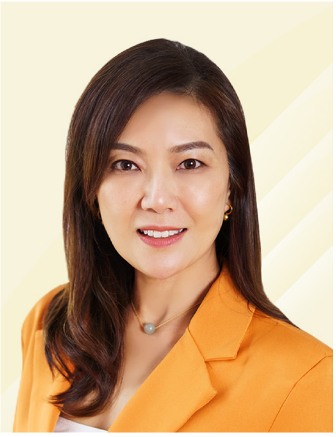
13:20 – 14:00	Breakout 2: **Is integrating the next generations the answer to ensuring lasting family legacies?**

Sabrina graduated from NUS Law School & was in the legal profession for 8 years where she built her career in corporate law at Baker & Mackenzie. During that period, she was also admitted as a solicitor to the New York Bar and the London Bar before going on to complete her Master's in Professional Accounting at SMU.

In her current role as Head of Corporate Development at Luxasia Group, she oversees key strategic initiatives for the Group and manages key strategic partnerships with brands such as LVMH. She is also Managing Director of the Luxasia business in 5 countries across Australia and Emerging Markets. She is responsible for the business performance and market expansion strategy in those markets, and maintains oversight on operations as well.

She finds the greatest meaning in driving the Group's CSR efforts through the Luxasia Foundation which focuses on giving back to under-privileged women in the 15 markets that Luxasia operates in.

Friday, 7 July 2023



Michelle LAU

Head of Wealth Planning SEA
Advisory & Sales
UBS Global Wealth Management

13:20 – 14:00	Breakout 2: **Is integrating the next generations the answer to ensuring lasting family legacies?**

Michelle has been a Trust and Estate practitioner for 3 decades, starting her career as a provider of fiduciary services to High Net worth individuals. She spent almost 2 decades of her career in HSBC Private Banking, managing Wealth Planning and Trust business for South East Asia. She also initiated the Ultra High Net Worth client segment in Asia Pacific and taken on leadership roles in HSBC Trustee, sitting on the Boards of the various Trustee entities including Directorships with regulatory responsibilities.

Prior to joining UBS, Michelle was CEO of IPG Howden (Singapore), partnering Private Banks, family offices, law firms and tax professionals. The role is an extension of Wealth Planning capabilities as an independent global insurance broker to provide unbiased advice and bespoke solutions for Ultra High Net Worth clients to achieve wealth transfer and preservation goals across generations.

Michelle holds a Bachelor degree from W. Australia and Master degree in Business Administration from Singapore Management University.

Friday, 7 July 2023

Jonathon ORR

Managing Director, Client and Product Solutions
Apollo Global Management

14:10 – 15:30	**Concurrent small group meetings**

Jonathon joined Apollo in 2023 in the Client and Product Solutions team as a Managing Director responsible for client portfolio management across EMEA wealth.

Prior to joining Apollo, Jonathon spent 18 years at Goldman Sachs in both London and New York. His most recent role was head of product strategy and market intelligence for Goldman Sachs Asset Management and prior to that he held fixed income portfolio management positions within asset management and risk management positions within the global markets division.

Jonathon graduated from the University of Bath with a degree in Business Administration and is a CFA Charterholder.

Friday, 7 July 2023

Barnaby LYONS

Global Co-Head of Special Situations
Bain Capital

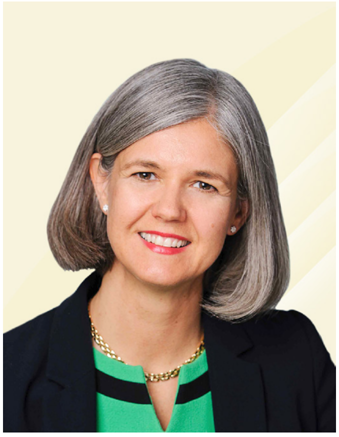
14:10 – 15:30	**Concurrent small group meetings**

Barnaby joined Bain Capital in 2006. He is a Partner and Global Co-Head of Bain Capital Special Situations as well as the Head of Bain Capital Credit in Asia.

Prior to his current role, Barnaby was based in Bain Capital's London office covering European Special Situations opportunities. Previously, Mr. Lyons was a consultant at Bain & Company.

Barnaby received an A.B. Phi Beta Kappa from Princeton University.

Friday, 7 July 2023



Cécile BELAMAN

Partner
Bain Capital

14:10 – 15:30	**Concurrent small group meetings**

Cécile joined Bain Capital in 2008. She is a Partner on the European Investor Relations team.

Prior to joining Bain Capital, Cécile was with Morgan Stanley for nine years, most recently as Head of Global Fundraising for the Private Equity Fund of Funds business. Prior to 2003, Cécile was financial sponsor coverage officer for Morgan Stanley, overseeing investment banking relationships with private equity firms, including Bain Capital Europe. Cécile also worked for the financial sponsors group at JPMorgan and for HVS International.

Cécile graduated from Cornell University with a BS and received an MA from London City University.

Friday, 7 July 2023

Daniel HILL

Product Specialist & Marketing
Brevan Howard Investment Management

14:10 – 15:30	**Concurrent small group meetings**

Daniel joined Brevan Howard in August 2015 as a member of the Investor Relations team. Prior to joining Brevan Howard Daniel was employed by Credit Suisse International as aSalesperson within the Fixed Income Department from September 2009 to August 2015 (Director).

Prior to this he was employed by Citigroup Global Markets Limited as Salesperson (Director) from September 2007 to September 2009. From 1998 to 2007 Daniel was employed by Merrill Lynch International with his latest position held being Director within Fixed Income, Currencies & Commodities.

Friday, 7 July 2023

Daniel CHENG

Managing Director, Infrastructure, Renewables & Transition Investing
Brookfield Oaktree Wealth Solution

14:10 – 15:30	**Concurrent small group meetings**

Daniel is a Managing Director in Brookfield's Infrastructure, Renewable & Transition Investment division. In this role, he is responsible for building and managing the renewable power business in China. Previously, Daniel was involved in Brookfield's renewable power investment activities, primarily in North America.

Prior to joining Brookfield in 2015, Daniel worked in the mergers and acquisitions investment banking division of BMO Capital Markets in Toronto.

Daniel holds a Bachelor of Business Administration degree from Wilfrid Laurier University and Bachelor of Mathematics degree from the University of Waterloo.

Friday, 7 July 2023

Lin HUANG

Senior Vice President
Marketing & Client Relations
Oaktree Capital Management

14:10 – 15:30	**Concurrent small group meetings**

Lin joined Oaktree in 2021 from King Street Capital Management, where she was a director for fundraising and investor relations. There, Lin had coverage of asset allocators in Asia ex-Japan and Korea across a diverse range of investors and absolute return products.

Prior thereto, Lin was an investment banking associate at Bank of America Merrill Lynch. Before that, she was an investment analyst for the Merrill Lynch Asian Real Estate Opportunity strategy.

Lin received a B. Comm. in finance from the University of British Columbia. She is a native Mandarin speaker.

Friday, 7 July 2023

Ganen SARVANANTHAN

Managing Partner
TPG Capital Asia

14:10 – 15:30	**Concurrent small group meetings**

Ganen Sarvananthan is the Managing Partner of TPG Capital Asia, Co-Head of Southeast Asia and a member of the TPG Inc Board and Executive Committee.

Prior to joining TPG in 2014, Ganen served as Head of Investments at Khazanah Nasional Berhad, the Government of Malaysia's strategic investment fund, for almost a decade. He also worked at UBS Investment Bank based in London, Hong Kong and Singapore for more than seven years.

He is a Barrister-at-Law (England and Wales) and read Law at University College London.