



Asian Multi Family Office

If it is worth striving for, it is worth preserving

Malaysia • Singapore • Hong Kong • Australia • Dubai

PRACTICE MANAGEMENT TRAINING

WEALTH PRESERVATION & BUSINESS SUCCESSION

Date : 12th / 19th / 26th JAN 2024

Time : 9am - 5pm (Lunch included)

Location : ISCA House
60 Cecil Street
Singapore 047709

Fee : Three-Day Enrolment \$3,000
Two-Day Enrolment \$2,300
One-Day Enrolment \$1,200

*Fees excluding GST

Speaker:

Alvin Yap

Group Principal Consultant,
Group Managing Director

PROGRAM OUTLINE

Day 1

Pillars of Family Wealth & Business Succession Planning

Session 1: Family Wealth & Business Succession Planning

- Introduction and Case Studies
- Strategies for allocating privileges, position, and power

Session 2: Wealth Holding Structures

- Centralization of family wealth
- Wealth preservation vehicles

Session 3: Generational Wealth Strategies

- Member class structures
- Asian families with only daughters
- Consequences of not planning
- Family & working dividend
- Bottom-up double portion calculation method

Day 2

Dynamics of Family Wealth & Business Succession Planning

Session 4: Family Governance

- Family Council
- Family Constitution
- Family Committees
- Gaining autonomy in family governance

Session 5: Why Family Conflicts Always Creep In

- Root causes of family conflicts
- Revive family unity

Session 6: Mitigating Asian Cultural Flaws

- Undesirable stereotypes
- Counseling for change
- Grooming the succeeding generation

Day 3

Strategies for Family Wealth & Business Succession Planning

Session 7: Family Wealth is Best Managed by the Family

- Agency Conflict vs Outsourced Chief Investment Officer
- Family Office Investment Committee
- Investment Policy Statement

Session 8: When Unrelated Partners Share a Business

- Dynamics between majority and minority shareholders
- Consequences of not having a shareholder succession plan
- From "Shareholders agreement" to "Shareholders succession agreement"
- Planning a shareholder exit
- Business continuation trust

Session 9: Non-family Key Executives in Your Succession Plan

- Share class rights
- Using share awards for succession planning



Alvin Yap

SPEAKER PROFILE

Alvin Yap is the Principal Consultant and Group Managing Director of A.D. Financial Group. Under his leadership, the Group has expanded its footprint throughout the Asia-Pacific region, with offices from Malaysia to Singapore, Australia and Hong Kong. We also have corporate partnerships in Dubai.

He is highly sought-after as a speaker in international family wealth planning seminars. His expertise in business succession planning has led many business owners and founders of listed companies from Malaysia, Indonesia, Australia, Thailand, Vietnam, Singapore, and China to seek his advice on their complex business continuation and personal wealth matters.

A strong believer in *Preservation First, Accumulation Second* and *Distribution Last*, Alvin injects a fresh perspective on how a family's wealth legacy and Asian values can be preserved for many generations.

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