

## “NEW APPROACHES BY FAMILIES TO WITHSTAND FINANCIAL ‘CRISES’: STRATEGIES TO CREATE AND MAINTAIN GENERATIONAL WEALTH”

19 November 2009 (Thursday) • 12.00-2.15pm; SGX Auditorium

### About this Seminar

In this Seminar, Barbara Hauser will deal with the following issues:

#### Current situation?

- Analysing current methods by which Asian entrepreneurial families tend to create their wealth by operating family controlled business.
- Reviewing consideration of various patriarch entrepreneur business continuation objectives.
- Identifying family business liquidity issues.
- The role of family members to oversee the safety and growth of the operating businesses.
- The differences between “new wealth” and “old wealth” objectives.

#### What is changing?

- Ways to improve the odds against continuing the operating family business.
- Need for better due diligence and risk management.
- Reassessing the justification to “keep the family in the business”.

The speaker will also offer her advice on strategies to create and maintain generational wealth, particularly in Asia, including:

- Reviewing criteria for investments including risk management strategy.
- Developing family leadership and management skills of next generation.
- Setting objectives for family member skill development and competency assessment.
- Formalising family decision making processes and procedures.
- Forming alliances with “similar” families—to co-invest and share in due diligence.

Due to the relevance and importance of the subject matter, STEP (Singapore) welcomes STEP Members to bring their private bankers and client families to attend as their guests at a preferential rate, so they may also benefit from this learning opportunity.

### Seminar Programme

12.00 - 12.30pm	Registrations & Standing Buffet Lunch
12.30 - 12.35pm	Opening Remarks & Overview by Chairperson:
	Mr. Alex van der Zwaard - Vice-President, STEP (Singapore Chapter); Managing Director, Asia Management House
12.35 - 2.00pm	“New approaches by families to withstand financial ‘crises’: Strategies to create and maintain generational wealth”
	Ms. Barbara R. Hauser, J.D.
2.00 - 2.15pm	Q&A Session & Closing Remarks

### About the Speaker

**Ms. Barbara R. Hauser, J.D.**

Ms. Hauser was a principal in US law firms with extensive experience in international wealth transfer planning after which she began to focus more on the family issues that cause disruptive conflicts. She has also taught law school (comparative legal systems) and consulted for banks, trust companies and family offices. Her books include *International Estate Planning: A Reference Guide*, “Mommy, are we rich?": *Talking to Children about Family Money*, and *International Family Governance: A Guide for Families and their Advisors*. She has also authored a number of articles for STEP and other journals.

### About the Chairperson

**Mr. Alexander van der Zwaard - Vice-President, STEP (Singapore Chapter); Managing Director, Asia Management House**

Alex is the founder and Managing Director of Asia Management House, a boutique fiduciary firm providing active management services to Singapore domiciled investment holding companies. Graduated from Erasmus University in the Netherlands, Alex is a lawyer by training. He has 15 years of experience in the industry and has headed the trust and structuring services division of one of the world's largest trust companies in Hong Kong and Singapore. He was also a member of the management team of MeesPierson Asia. He has been a member of the Management Committee of the Society of Trusts and Estate Practitioners (Singapore Chapter) since 2005.

### REGISTRATION FORM

Name (Dr/Mr/Mrs/Miss/Mdm): \_\_\_\_\_

Name and Address of Organisation: \_\_\_\_\_

STEP Membership No: \_\_\_\_\_ Position in Organisation: \_\_\_\_\_

Tel number: \_\_\_\_\_ Fax number: \_\_\_\_\_ Email: \_\_\_\_\_

(A valid email address is required for confirmation of registration.)

#### REGISTRATION FOR GUEST(S) OF STEP MEMBER:

Name of Guest 1:	Name of Guest 2:	Name of Guest 3:
Email Address:	Email Address:	Email Address:

#### MEMBERSHIP (Please circle as appropriate.)

	FEES
Members of STEP, CPA Australia, CPA Singapore/ICPAS, International Fiscal Association (IFA), Law Society of Singapore, Singapore Corporate Counsel Association (SCCA), Singapore Trustees Association (STA), Singapore Association of the Institute of Chartered Secretaries and Administrators (SAICSA)	<b>S\$50</b>
Guest of STEP Member	<b>S\$60</b>
Others	<b>S\$80</b>

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Account Name: STEP (Singapore Chapter)

Account Number: 048-017070-6

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Bank Details: DBS Bank

Address: Raffles Place Branch, 22 Malacca Street, #01-00 Royal Brothers Building, Singapore 048980.

Please email [secretariat@step.org.sg](mailto:secretariat@step.org.sg) after the T/T has been done for our follow-up with the bank. Registration fees must be received nett of all bank charges.

#### Cheque Details:

Cheque payments should be made payable to “STEP (SINGAPORE CHAPTER)” & arrive at our office at “c/o INTELLITRAIN PTE LTD, 3 Raffles Place #07-01 Bharat Building S048617” with the completed registration form on or before the closing date, **Thursday, 12 November 2009.**

For further enquiries, please contact: STEP (Singapore) Secretariat

**Tel: 31287781 (no 6 prefix) Fax: (65) 63299699 E-mail: [secretariat@step.org.sg](mailto:secretariat@step.org.sg) Website: [www.step.org.sg](http://www.step.org.sg)**

#### REGISTRATION, REFUND & CANCELLATION POLICY

1. Registrations will be confirmed upon receipt of full payment accompanied by a duly completed registration form.
2. The Organisers reserve the right to refuse to register or admit any participant, and to cancel or postpone the course.
3. Equivalent substitute delegates are welcomed, subject to the Organisers being notified at least 2 working days before the course of the substitute delegate.
4. The Organisers will not entertain any request for a refund of fees. However a confirmed registrant who has paid in full the course fees but does not turn up for the course will be entitled to collect a set of the materials provided.