

### Asia Pacific Wealth Management Conference

24 APRIL, HONG KONG  
26 APRIL, SINGAPORE



#### Jun Au

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Jun is an Associate in Baker McKenzie's tax team in Sydney. Jun primarily focuses on corporate tax matters, domestic and international acquisitions and reorganisations and tax planning matters involving family-owned groups and high net worth individuals.



#### Simon Beck

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Simon Beck is a partner and chair of the North America Wealth Management Group at Baker McKenzie's New York office. Simon is an international tax and trust lawyer with vast experience working in the world's trust and financial centers. He has also practiced in Miami, London, Monte Carlo and Madrid, and was head of Legal, Compliance and Trust & Fiduciary Services for Coutts, one of the world's leading private banking institutions, prior to joining Baker McKenzie.

Simon lectures regularly on trust, financial service and compliance issues at global wealth management and international trust and estate planning conferences around the world.

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## Pierre Chan

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Pierre Chan's practice focuses on Hong Kong and regional tax advisory, tax dispute resolution and succession planning. He advises multinational companies, financial institutions, insurance companies as well as investment and pension funds with respect to their income tax and stamp duty issues, as well as tax issues relating to mergers and acquisitions. He also advises wealthy families in relation to their succession planning as well as the legal and tax issues arising from their businesses.

Over the years, Mr. Chan has advised and represented taxpayers in relation to various major tax disputes in Hong Kong. He also advises charitable institutions with respect to their establishment and governance. He is recommended by The Legal 500 for his expertise in Hong Kong taxation matters.



## Istee Cheah

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Istee Cheah is an associate in the Tax, Trade and Wealth Management practice group in Wong & Partners.

Istee's experience in wealth management and succession planning includes advising high-net worth individuals, financial institutions and intermediaries on the legal, regulatory and tax issues in respect of setting up a succession planning structure. She has also assisted families and individuals with the actual implementation of such structures, which includes the setting up of Malaysian or offshore trust structures.



## Kwun Yee Cheung

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Kwun Yee Cheung focuses on complex commercial, trust and family wealth disputes, corporate, banking and shareholder disputes and company restructuring and insolvency.

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Jacopo Crivellaro is an associate in the Global Wealth Management practice group of Baker McKenzie in Zurich. Jacopo joined the practice after pursuing graduate law studies in the US and the UK. He has written a number of articles on international tax and estate planning matters and has spoken of these matters in conferences across Europe.

Jacopo focuses his practice on international taxation, estate and trust planning. He has advised individuals on US tax regularization and filing obligations relating to offshore entities and assets. He has also advised non-US clients in connection with US real estate investments. Recently, Jacopo has counseled non-US financial institutions on US tax issues associated with the Foreign Account Tax Compliance Act.



## Bruno Dominguez

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Bruno Dominguez is a partner and head of Baker McKenzie's Transfer Pricing practice in Barcelona. Bruno has extensive experience in tax planning and consultancy. He represents clients faced with tax inspections and court procedures in Spain, and advises family-owned businesses and multinationals with regard to business restructuring, mergers and acquisitions, transfer pricing, and cross-border transactions.

He also has significant experience in tax planning for high net worth individuals on the structure and ownership of assets, wealth transfer, succession and gift planning, expatriation issues, voluntary disclosure procedures and general estate planning matters.



## Amy Ling

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Amy Ling advises multinational companies on a range of issues relating to PRC tax and legal implications of investments in China, including mergers and acquisitions, divestitures, reorganizations, post acquisition integration, licensing, retail structures, supply chain structures and individual income taxation matters.

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Lisa Ma is an associate based in the Hong Kong office of Baker McKenzie. She advises financial institutions, independent trustee companies as well as wealthy families on private wealth management and succession planning matters. She also advises on income tax and stamp duty issues.

Prior to joining Baker McKenzie, she worked in a global bank as its in-house senior legal counsel. She provided legal support to the bank's private trustee business and advised on extensive range of legal issues and risks faced by the trustee company.

Lisa is a member of the Society of Trust and Estate Practitioners (STEP). She is also a member of the Hong Kong Institute of Chartered Public Accountants (HKICPA), and Association of Chartered Certified Accountants (ACCA).



## Kristine Mercado-Tamayo

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Kristine Anne Mercado-Tamayo is a senior associate in Quisumbing Torres' Tax Practice Group. She has 11 years of experience assisting clients on tax issues, involving corporate restructuring, mergers and acquisitions and other cross-border transactions, customs and international trade, as well as succession, estates and trusts.

Kristine Anne counsels wealth management institutions in respect of tax and legal implications of offshore structures. She also advocates on clients' behalf in controversies involving disputed tax assessments litigated before the Court of Tax Appeals and Philippine appellate courts.



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Ria Muhariastuti is a Senior Tax Specialist in the Tax & Trade Practice Group. She concentrates on domestic and international tax planning relating to inbound and outbound investment, multi-national companies and private banking for individuals. Her tax background allows her to provide comprehensive tax advice on a wide range of transactions.

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Noam Noked advises on U.S. and international tax matters, FATCA, CRS, tax compliance, trusts, wealth management, corporate and individual tax issues. He is based in the Hong Kong office of Baker & McKenzie.

Noam has published articles on various international tax matters. He has published articles on tax issues in journals in Hong Kong, such as The Hong Kong Lawyer, and in leading tax journals in the U.S., such as the Virginia Tax Review and the Florida Tax Review. He is a frequent speaker on international tax issues.



## Lydia Peh

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Lydia Peh is a member of the Firm's tax group and focuses on PRC tax advisory and corporate tax planning for foreign inbound investment, corporate reorganizations and mergers and acquisitions for international companies. Her practice area also includes transfer pricing in the PRC, and she has assisted clients in advance pricing arrangements negotiations with the Chinese tax authorities.



## Anthony Poon

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Anthony Poon is a senior dispute resolution lawyer in Baker & McKenzie Hong Kong. He was a principal of the firm until 2014 when he retired. Thereafter, he remains as a partner. His practice focuses on commercial arbitration and litigation in both Hong Kong and China with special emphasis on cross-border and joint venture disputes. Anthony's other practice areas include corporate compliance, product liability, shareholders disputes, and property disputes. His practice spans across Hong Kong and China. Anthony is a notary public.

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## Anthony Poulton

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Anthony Poulton is a partner in our Dispute Resolution team, based in our London office, and Chair of our market-leading Trusts Disputes group in London. Anthony specialises in advising clients engaged in disputes related to private wealth, trusts and private banking. In such disputes, he acts for trustees, executors, protectors, beneficiaries and interested third parties and is very familiar with all the major offshore jurisdictions.

Anthony has extensive experience of advising clients in relation to managing the risks associated with exposure to wealth-related controversy, including dealing with corporate governance and family governance and resolving 'private' family disputes. More generally, Anthony also has considerable expertise in handling general commercial litigation, including cases affected by fraud, asset tracing and financial recovery as well as situations involving applications for freezing or proprietary injunctions. He also assists trustees in handling disputes, managing formal litigation, carrying out risk audits and mitigating exposure to risks.



## Steven Sieker

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Steven Sieker heads the Asia Pacific tax practice group of Baker McKenzie across 12 countries. Steven is highly thought of in the market for his experience and work on contentious and non-contentious tax matters.

His practice focuses on Hong Kong and Asian regional tax advisory work, estate planning and tax litigation. He frequently represents clients in tax disputes with the Inland Revenue Department in Hong Kong.



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Panya joined Baker McKenzie in 2002 and became a Partner in 2012. He is currently a partner in the Tax Practice Group. He has also practiced and leads the International Commercial and Trade Practice Group, particularly in the customs and supply chain areas.

During his 15 years of practice with the firm, Panya has been recognized in advising clients on highly complex tax structures, offshore investment, international tax planning, tax disputes, and tax litigation. His practice also includes boutique tax areas, e.g. customs duty, excise tax, and property tax.

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Prof. Kitipong is Chairman of the Bangkok Office. He is Head of the Financial Services Division, handling work related to Capital Markets, debt and corporate restructuring, as well as Head of the Tax Practice Group.

Prof. Kitipong began his career as a general commercial and tax lawyer in the year 1978. With more than 40 years of working experience in Thailand and his time spent in Baker McKenzie's Singapore Office, he has gained extensive experience in business laws related to financial institutions, capital markets, tax planning and providing legal and tax advice in respect to corporate & debt restructuring. In particular, he has substantial knowledge and has provided advices in laws related to Family Business Governance and tax planning in Thailand from the year 2003 until present.



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Enoch Wan is a senior associate based in the Singapore office of Baker McKenzie. Enoch's practice focuses on commercial agreements and contracts, tax controversy and litigation, wealth management, VAT & indirect tax.



## **Richard Weisman**

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Richard Weisman advises on international tax and trust matters with a focus on Asia and the US. He advises many financial institutions and high net worth individuals on international wealth management matters including tax planning, compliance, and dispute resolution. He has also advised governments and industry groups on tax policy matters. His practice includes advising publicly listed and privately held companies on international tax matters, including foreign direct foreign investment, mergers and acquisitions, transfer pricing, permanent establishment concerns, tax treaty issues, and dispute resolution.



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Adeline Wong heads the Tax, Trade and Wealth Management practice group in Wong & Partners. She has more than 27 years of experience spanning a broad category of tax work, her scope and depth of knowledge covers transfer pricing, corporate tax planning and advisory, tax audits & investigations, tax controversies, foreign trade and WTO matters, and wealth and trust management, for both local and international clients.

Adeline is a full member of the Society of Trust and Estate Practitioners ("STEP"). Her extensive experience in the trust and wealth management space includes advising investment banks, financial institutions and high net worth families on tax, trust and estate planning issues with a focus on using onshore and offshore trust structures and other vehicles to help clients hold and transfer wealth. Her practice in this area includes advising on securities laws, insurances laws and other corporate and regulatory issues arising from the transfer of assets and securities into a trust structure and the ongoing reporting and disclosure requirements.



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Ivy Wong is a special counsel of capital markets practice in Hong Kong. Her practice focuses on corporate finance, mergers and acquisitions, compliance and general commercial work. She has taken a leading role in many unprecedented and high-profile cross-border transactions involving multinational corporates.



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Michael S. Wong is the head of the Mergers & Acquisitions, Private Equity and Tax Practice Groups in the Taipei office of Baker McKenzie. His unrivalled depth and scope of experience covers a diverse spectrum of handling complex multi-jurisdictional acquisitions, joint ventures, infrastructure projects as well as technology/media/telecom ("TMT") matters.