

**Baker
McKenzie.**

2024 Asia Pacific

Wealth Management Symposium

16 April, Singapore | 18 April, Hong Kong

Updated as of 15 April 2024



Contents

About the event	03
Agenda – Singapore	04
Agenda – Hong Kong	06



About the event

2024 Asia Pacific Wealth Management Symposium |

2024 Asia Pacific Wealth Management Symposium

Baker McKenzie is pleased to invite you to our **2024 Asia Pacific Wealth Management Symposium** for wealth management professionals, including wealth and estate planners, trustees and private bankers assisting high net worth families in their asset management and succession planning.

In this symposium, our wealth management experts from across Asia will come together to discuss current and future challenges and opportunities affecting family businesses and private wealth owning structures in the region. We will examine significant developments such as the application of Australian anti-avoidance laws to trust distributions, Mainland Chinese tax administration practices as regards share transfers by individual shareholders, Indonesia's anti-avoidance measures, Japan's exit tax and trust taxation, Malaysia's new capital gains tax regime, updates on tax incentives for family offices in Hong Kong and Singapore, and the implementation of Taiwan's controlled foreign corporation rules. We will discuss the practical implications of foreign-source income issues such as economic substance concerns in Hong Kong, Malaysia and Singapore, changes to Hong Kong's tax treatment of foreign-source disposal gains, Singapore's new Section 10L as regards gains from the sale of foreign assets, and changes to the tax treatment of offshore-source income received by Thai tax resident individuals. Additionally, we will share our insights into the continuing practical implications of key trust cases.

We look forward to seeing you at the symposium!

Best regards,



Pierre Chan
Partner, Hong Kong
+852 2846 1560
pierre.chan@bakermckenzie.com



Dawn Quek
Principal, Singapore
+65 6434 2599
dawn.quek@bakermckenzie.com

For conference inquiries or to request one-on-one meetings, please contact:

Joyce Guantero

maryjoyce.guantero@bakermckenzie.com

Gelo Casero

michael.casero@bakermckenzie.com

Follow us



LinkedIn

[linkedin.com/company/baker-&-mckenzie](https://www.linkedin.com/company/baker-&-mckenzie)



Twitter

twitter.com/bakermckenzie

Agenda – Singapore

2024 Asia Pacific Wealth Management Symposium

Tuesday, 16 April 2024

08:30 am – 09:00 am **Registration**

09:00 am – 09:10 am **Welcome Address**

09:10 am – 10:40 am **Regional Updates (90 mins)**

In this session, our wealth management experts from Australia, Mainland China, Hong Kong, Indonesia, Japan, Malaysia, Philippines, Singapore, Taiwan and Thailand will provide updates on developments that affect, among others, estates structuring, trusts structuring and succession planning. We will discuss, among other issues, the following:

- the application of Australia’s Section 100A and broader anti-avoidance laws to trust distributions to tax advantaged beneficiaries – what’s possible and what’s not?
- Mainland Chinese tax authorities’ practices as regards share transfers by individual shareholders
- changes to Hong Kong’s tax treatment of foreign-source disposal gains
- Hong Kong’s new tax concession regime for eligible family-owned investment holding vehicles managed by single family offices
- the introduction of anti-avoidance measures into the Indonesian Income Tax Law
- Japan’s exit tax and trust taxation, and incentives for start-up investments
- Malaysia’s new capital gains tax regime with consequential changes to foreign-source income and real property gains tax rules
- Singapore’s new Section 10L as regards the taxation of gains from the sale of foreign assets
- updates on Singapore’s fund tax incentives and the new philanthropy tax incentive scheme
- the implementation of controlled foreign corporation rules in Taiwan
- changes to the tax treatment of offshore-source income received by Thai tax resident individuals



Dawn Quek
Moderator,
Principal, Singapore



John Walker
Partner, Australia



Jason Wen
Senior Tax
Consulting Director,
China



Pierre Chan
Partner,
Hong Kong



Ria Muhariastuti
Senior Tax Specialist,
Indonesia



Ryutaro Oka
Partner, Japan



Istee Cheah
Partner, Malaysia



Enoch Wan
Senior Associate,
Singapore



Michael Wong
Special Senior
Consultant,
Taiwan



Peggy Chiu
Partner, Taiwan



Nitikan Ramanat
Legal Professional,
Thailand

10:40 am – 10:50 am **Coffee Break**

Agenda – Singapore

2024 Asia Pacific Wealth Management Symposium |

Tuesday, 16 April 2024

10:50 am – 12:20 pm **Litigation Updates: Trust Cases and Lessons Learnt (90 mins)**

In this fast-paced session, our wealth management and trust litigation experts will review recent trust law and related cases in Singapore and other jurisdictions that affect the wealth management industry.



Anna Hwang
Moderator,
Principal, Taiwan



Lisa Ma
Special Counsel,
Hong Kong



Tjen Wee Wong
Principal, Singapore



Enoch Wan
Senior Associate,
Singapore

12:20 pm – 12:30 pm **Closing Remarks**

12:30 pm onwards **Networking Lunch**

Agenda – Hong Kong

2024 Asia Pacific Wealth Management Symposium

Thursday, 18 April 2024

08:30 am – 09:00 am **Registration**

09:00 am – 09:10 am **Welcome Address**

09:10 am – 10:40 am **Regional Updates (90 mins)**

In this session, our wealth management experts from Australia, Mainland China, Hong Kong, Indonesia, Japan, Malaysia, Philippines, Singapore, Taiwan and Thailand will provide updates on developments that affect, among others, estates structuring, trusts structuring and succession planning. We will discuss, among other issues, the following:

- the application of Australia's Section 100A and broader anti-avoidance laws to trust distributions to tax advantaged beneficiaries – what's possible and what's not?
- Mainland Chinese tax authorities' practices as regards share transfers by individual shareholders
- changes to Hong Kong's tax treatment of foreign-source disposal gains
- Hong Kong's new tax concession regime for eligible family-owned investment holding vehicles managed by single family offices
- the introduction of anti-avoidance measures into the Indonesian Income Tax Law
- Japan's exit tax and trust taxation, and incentives for start-up investments
- Malaysia's new capital gains tax regime with consequential changes to foreign-source income and real property gains tax rules
- Singapore's new Section 10L as regards the taxation of gains from the sale of foreign assets
- updates on Singapore's fund tax incentives and the new philanthropy tax incentive scheme
- the implementation of controlled foreign corporation rules in Taiwan
- changes to the tax treatment of offshore-source income received by Thai tax resident individuals



Pierre Chan
Moderator,
Partner, Hong Kong



John Walker
Partner, Australia



Jason Wen
Senior Tax
Consulting Director,
China



Ria Muhariastuti
Senior Tax Specialist,
Indonesia



Ryutaro Oka
Partner, Japan



Istee Cheah
Partner, Malaysia



Dawn Quek
Principal, Singapore



Michael Wong
Special Senior
Consultant, Taiwan



Peggy Chiu
Partner, Taiwan



Daniel Chou
Associate Partner,
Taiwan



Nitikan Ramanat
Legal Professional,
Thailand

10:40 am – 10:50 am **Coffee Break**

Agenda – Hong Kong

2024 Asia Pacific Wealth Management Symposium |

Thursday, 18 April 2024

10:50 am – 12:20 pm

Litigation Updates: Trust Cases and Lessons Learnt (90 mins)

In this fast-paced session, our wealth management and trust litigation experts will review recent trust law and related cases in Singapore and other jurisdictions that affect the wealth management industry.



Gillian Lam
Moderator,
Senior Associate,
Hong Kong



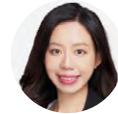
Lisa Ma
Special Counsel,
Hong Kong



Tjen Wee Wong
Principal, Singapore



Enoch Wan
Senior Associate,
Singapore



Peggy Chiu
Partner, Taiwan

12:20 pm – 12:30 pm

Closing Remarks

12:30 pm onwards

Networking Lunch

Baker McKenzie delivers integrated solutions to complex challenges.

Complex business challenges require an integrated response across different markets, sectors and areas of law. Baker McKenzie's client solutions provide seamless advice, underpinned by deep practice and sector expertise, as well as first-rate local market knowledge from more than 70 offices globally.

Celebrating its 75th anniversary in 2024, Baker McKenzie works alongside clients to deliver solutions for a connected world.

Baker McKenzie.

bakermckenzie.com

© 2024 Baker McKenzie. All rights reserved. Baker & McKenzie International is a global law firm with member law firms around the world. In accordance with the common terminology used in professional service organizations, reference to a "partner" means a person who is a partner or equivalent in such a law firm. Similarly, reference to an "office" means an office of any such law firm. This may qualify as "Attorney Advertising" requiring notice in some jurisdictions. Prior results do not guarantee a similar outcome.

