



檳州中華總商會

DEWAN PERNIAGAAN TIONGHUA PULAU PINANG
PENANG CHINESE CHAMBER OF COMMERCE

敬致：檳州中華總商會會員

Date: 16 November 2018

誠邀出席“財富策劃講座會”

檳中總專誠邀請閣下出席由本會經濟、財務及關稅組與新加坡星展銀行(DBS Bank)於2018年12月4日在檳州中華總商會陳國平軒聯合舉辦的“財富策劃講座會”。

眾所周知，財富管理不僅是增加財富，保護您的財富並確保在未來按照您的意願處理財富也同等重要，這些就是我們所說的財富策劃。

目前單一家族理財辦公室越來越成為許多家庭財富規劃的一個組成部分。任何有意建立這種結構的家庭都必須考慮有關家族理財辦公室將提供的服務類型，它所需要的人力和其他資源，以及最後但並非最不重要的確定其建立的管轄權。

我們歡迎各位出席“財富策劃講座會”，聆聽我們的演講嘉賓講述家族理財辦公室和財富規劃領域的最新發展以及正確的財富策劃的重要性，有關計劃將是根據您和您家人的情況和目標而定制的。

有關詳情如下：

日期：2018年12月4日(星期二)
時間：下午1時30分至5時
地點：檳州中華總商會大廈陳國平軒
媒介語：英語
報名費：免費
服裝：整齊端莊

如若閣下能參與，敬請填妥所附上之報名表格，並於2018年11月28日(星期三)前繳交至檳中總秘書處(電郵：limian@pccc.org.my 電話：04-250 4050；傳真：04-250 4059)。謝謝。

助理執行秘書李金枝 謹啟

To: All PCCC Members

Re: Invitation to “Wealth Planning Seminar”

We are please to invite you to an exclusive event, “Wealth Planning Seminar” jointly organized by PCCC Economics, Finance & Taxation Committee and DBS Bank, Singapore on Tuesday, 4 December 2018 at PCCC Tan Kok Ping Hall.

Wealth management is more than just about growing your wealth. Protecting that wealth and ensuring it is dealt with in accordance with your wishes in the future should be equally, if not more, important. We call these considerations wealth planning.

Single Family Offices are increasingly becoming an integral part of wealth planning for many families. Any family considering establishing such a structure has to consider, amongst other things, the type of services that the family office will provide, the manpower and other resources it will require, and last but not least the jurisdiction in which it should be established.

Join us and hear from our guest speakers as they discuss the latest developments in the areas of Family Offices and Wealth Planning, and the importance of a right wealth plan that is customized to fit the circumstances and goals for you and your family.

The details of event are as below :

Date : 4 December 2018 (Tuesday)
Time : 1.30pm – 5.00pm
Venue : Tan Kok Ping Hall, PCCC Building (1st Floor, No.3, Light Street, 10200 Penang)
Medium : English
Registration Fee: FOC
Dress Code: Business Attire

Please RSVP your attendance by completing the enclosed registration form and email to limian@pccc.org.my or fax to PCCC Secretariat at Fax: 04-250 4059 latest by 28-11-2018. Thank you.

LEE KIM KEE
Assistant Executive Secretary



檳州中華總商會

DEWAN PERNIAGAAN TIONGHUA PULAU PINANG
PENANG CHINESE CHAMBER OF COMMERCE

财富策划讲座会
Wealth Planning Seminar

日期 Date : 2018年12月4日(星期二) 4 December 2018 (Tuesday)

时间 Time : 下午1时30分至5时 1.30 p.m. – 5.00 p.m.

地点 Venue : 檳州中華總商會大廈陳國平廳 Tan Kok Ping Hall, PCCC Building

流程表 TENTATIVE PROGRAM

- 1:30pm - 嘉宾莅临
Arrival of Guest
- 2:00pm 檳州中華總商會代表致歡迎詞
Opening Speech by PCCC Representative
- 贈送紀念品
Presentation of Memento
- 2:05pm - Mr. Peter Henry Triggs 專題分享
星展私人銀行區域財富規劃董事經理
- Briefing by Mr. Peter Henry Triggs
Managing Director, Regional Wealth Planning DBS Private Bank
- 2:50pm - Ms Kylie Luo 專題分享
新加坡德豪國際會計師事務所稅務執行董事
- Briefing by Ms Kylie Luo
Executive Director, Tax, BDO Global Private Client Services
- 3:35pm - 問答
Q & A
- 4:10pm - 茶點與交流
Tea Refreshment & Private Discussion
- 5.00pm 結束
End



檳州中華總商會

DEWAN PERNIAGAAN TIONGHUA PULAU PINANG
PENANG CHINESE CHAMBER OF COMMERCE

Speaker Profile

1. Kylie Luo

Executive Director, Tax
Leader, Asset & Wealth Management (Tax)
BDO Global Private Client Services

Professional Background

Kylie Luo is an international tax advisor with over 18 years' experience and advises on tax relating to asset and wealth management. Kylie joined BDO Singapore in 2015 to focus on assisting high net worth families with their tax, trust and estate planning issues on a multi jurisdictional basis, and helping clients to hold and transfer wealth through generations. Prior to joining BDO, Kylie was a tax principal with a Big Four Accounting firm.

2. Peter Henry Triggs BA, FCA, CTA, TEP, Cht

Managing Director, Regional Wealth Planning DBS Private Bank

Fellow of the Institute of Chartered Accounts
Chartered Tax Adviser (UK)
Associate of the Society of Trust and Estate Planners
University of Birmingham (Honors degree in Mathematics and Philosophy)

Professional Background

Peter joined DBS in 2012 to Head the International Private Banking Team and the Regional Wealth Planning Team.

Prior to joining DBS, Peter was Deputy CEO at Bank of China (Suisse) SA in Geneva. Before that, Peter worked for the Citibank Private Bank for nineteen years, in Jersey (Head of Cititrust (Jersey) Limited), in Zurich (Head of Trust Marketing for Europe and the Middle East) and then in Asia as Head of Trust, and as Head of Private Banking in Singapore and Malaysia. More recently, Peter worked in London and Geneva as Managing Director of The UHNW Middle East Group.

Prior to this, Peter worked for Deloitte as a Tax Principal in their London office.

1. Kylie Luo

税务执行董事
资产和财富管理领导者(税务)
BDO 全球私人客户服务

专业背景

Kylie Luo 是一位拥有超过 18 年经验的国际税务顾问, 专门为资产和财富管理相关税务提供咨询。她于 2015 年加入新加坡德豪国际会计师事务所(BDO), 专注协助高净值家庭在多个司法管辖区基础上之税收, 信托和房地产规划问题及帮助客户进行跨代的财富持有和传承。在加入德豪国际会计师事务所之前, 她是四大会计师事务所之一的税务负责人。

2. Peter Henry Triggs BA, FCA, CTA, TEP, Cht

星展私人银行区域财富规划董事经理
特许会计师协会会员
特许税务顾问(英国)
信托和房地产规划师协会会员
伯明翰大学(数学与哲学荣誉学位)

专业背景

Peter 于 2012 年加入星展银行, 担任国际私人银行业务和区域财富规划团队的负责人。

在加入星展银行之前, Peter 曾在日内瓦的中国银行(瑞士)担任副首席执行官。在此之前, 他在花旗银行私人银行工作了十九年, 先后出任泽西岛 Cititrust (Jersey) Limited 主管、苏黎世(欧洲和中东信托营销负责人)、接着在亚洲担任信托主管和新加坡及马来西亚私人银行业务主管。过后, Peter 在伦敦和日内瓦担任 UHNW 中东集团的执行董事。在此之前, 他曾在德勤担任伦敦办事处税务负责人。



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DEWAN PERNIAGAAN TIONGHUA PULAU PINANG
PENANG CHINESE CHAMBER OF COMMERCE

财富策划讲座会

Wealth Planning Seminar

4 December 2018 (Tuesday) * 1:30pm-5:00pm * Tan Kok Ping Hall, PCCC Building

REGISTRATION FORM

Participant's Correspondence Details:

Name of Company : _____

Address : _____

Tel : _____ Fax : _____

Email : _____

Name of Participants:

	Name	Designation	Email
1.			
2.			

Contact Person : _____

Tel / Handphone : _____ Email : _____

Closing Date of Registration : 28 November 2018

Kindly send the duly completed registration form to: PCCC Secretariat
No. 3, Light Street, 10200 Penang
Tel: 04-250 4050 Fax: 04-250 4059 E-mail: limian@pccc.org.my
Contact Person: Miss Chiew