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## **Advanced Succession Planning Strategies for UHNWIs and Families, Multi-Jurisdictional and Complex Clients**

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**Date:** 10 July 2025 (Thursday)

**Time:** 9:30am – 12:30pm (HKT)

**Venue:** Room 1501-2, 15/F, Hong Kong Club Building, 3A Chater Road, Central

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*\* The above seminar is a re-run of the webinar on 19 March. We are excited to offer the same session in a face-to-face format to enhance interaction and benefit participants who have missed the last session.*

### Course Outline

- Advances strategies for wealth planning and succession
- Family Offices, Trusts and Structures used in Succession Planning
- Strategies for Tax Planning
- Involving, engaging and aligning with next generations

### Speaker

#### **Steve Kean**

Steve Kean has over 3 decades of experience in international financial planning and wealth management, with a background that includes strategic and transformation management consulting and establishing and expanding successful life insurance platforms with 2 leading international private banks. Steve has trained thousands of professionals in Europe and across Asia through workshops designed to simplify complex financial concepts. Passionate about empowering others with actionable knowledge, he is committed to elevating industry standards and positive client outcomes.