

FPAS - LUNCHTIME TALK

Topic : **Wealth Preservation and Legacy Creation**

Date : **Wednesday, 30 June 2010,**

Time : **11.45am to 2.00pm,**

Venue : **Capital Tower, Level 9, FTSE Room**

Outline of the Talk

HWN clients often have a background that is different from the 'average' client, yet their hopes, dreams and aspirations are not so different as to call for dramatically different solutions. Advising the HNW client one would do well to remember that superior investment performance is often not the key driver in initiating a relationship – after all, most of them already enjoy significant returns in their own businesses.

This talk focuses on an often overlooked concept for financial advisers, both in the HWN and retail environments – investments are a form of diversification and is often meant to last more than one generation. The HNW investor has rarely become HNW through pure investment activities and there is generally an operating business underlying the family's wealth. To advise the HNW investor one needs to understand where the wealth has come from and where it may be going – what needs preserving and what will create a legacy for future generations.

Increasingly volatile investment markets calls for both a long-term view to wealth preservation and growth, often a view well beyond our own time. Strategic Legacy Creation deals with that part of the client's assets that are earmarked for the next generation or philanthropic causes and we suggest this will represent a key area of growth in an increasingly crowded investment adviser market.

About Our Speaker



Mr Odd Haavik, TEP
Managing Director & CEO
Charles Monat Associates, Singapore

Mr. Odd Haavik, TEP is the Managing Director and CEO of Charles Monat Associates Singapore, the leading adviser to Ultra High Net Worth individuals and businesses. Prior to opening the Singapore office for the Charles Monat Group in 2005, Mr. Haavik spent 15 years practicing with some of Europe's leading investment banks in Hong Kong and Singapore.

Charles Monat Associates serves its Clients and Partners through its offices in Hong Kong, Singapore and Boston and specializes in creative Wealth Protection and – Succession strategies for UHNW families and businesses.

11.45am – 12.30pm	Registration and refreshment
12.30pm – 12.35pm	Welcome address
12.35pm – 1.35pm	Presentation by Mr Odd Haavik
1.35pm – 1.45pm	Questions and Answers Session
1.45pm – 2.00pm	Closing & Collection of Feedback Form

Registration fee:

- Members - S\$30.00 nett
- Non Members - S\$45.00 nett

**Group registration discount will be given to a group of 10 participants and more. Each participant shall enjoy a discount of \$5 off the listed registration fee. For group registration, please indicate the main contact for the group and each participant is required to complete the registration form. **

Closing date for registration is: Wednesday 23 June 2010

FPAS

FINANCIAL PLANNING

Association Of Singapore

Email: fpas@fpas.org.sg Website: www.fpas.org.sg
FAX no: 6372 0121

REGISTRATION FORM

Topic	Wealth Preservation and Legacy Creation
Speaker	Mr Odd Haavik
Date	Wednesday, 30 June 2010
Time	11.45am to 2.00pm
Venue	FTSE Room, Level 9, Capital Tower
Registration Fee	Member: S\$30.00 nett per participant Non-Member: S\$45.00 nett per participant (Include refreshment served from 11.45am)
CPD Eligibility	1 CPD hour

Payment Details:

I enclosed is bank/cheque no. of S\$ made payable to "FPAS".

Important note:

1. Please indicate your name, NRIC no. and "Lunchtime talk (LTT0610)" on reverse of the cheque.
2. Please mail your registration form and cheque payment to:

**Financial Planning Association of Singapore,
Robinson Road #04-02 Singapore 068909**

Or

3. **Visit our office and make payment either by Credit Card (VISA/MASTERCARD), DBS/POSB ATM Card for Debit Transaction or CASH.**
4. Advance payment is required to confirm your seating. Your cheque payment must reach FPAS before 23 June 2010.
5. An email confirmation will send to you within two working days after the official closing.
6. FPAS reserves the right to make any changes to the workshop due to unforeseen circumstances or when FPAS considers it desirable and appropriate. FPAS' decision is final.

Name (Dr/Mr/Ms/Mrs):	
FPAS Membership No.	(if applicable):
NRIC No	
Contact No.	M <input type="text"/> <input type="text"/> <input type="text"/> O <input type="text"/> <input type="text"/> <input type="text"/> FAX <input type="text"/>
Email :	Please note that email address is mandatory for acknowledgements and any last minute updates/changes to the event, if any)
Company Name	
Non FPAS' member, please provide your Mailing Address :	

Signature

Date