

Family Firm Governance

PRACTICAL CONSIDERATIONS

with **Bernard Fung**

Managing Director & Head of Wealth Planning Services, Asia Pacific
Credit Suisse

Generational transition is imminent for business families and many find themselves awake at night planning for their succession.

This program is designed to provide a platform for business families to hear from seasoned practitioners who have worked alongside families for the past decade. It aims to share practical knowledge on managing issues stemming from generational transition and how families can begin their own journey.

CORE TAKEAWAYS

- 1. "What should I be considering?"**
Perspectives and dilemmas faced by business families
- 2. "How are other families preparing for succession?"**
Elements and tools to manage generational transition
- 3. "What should I be discussing with my family?"**
Common areas of discussion in building a family constitution
- 4. "How can I get started?"**
Practical tips and typical phases of the process

PROGRAMME

SCHEDULE

2.00 pm	ARRIVAL & REGISTRATION
2.15 pm	START OF SESSION
4.00 pm	Coffee Break with Refreshment
4.30 pm	Q & A
5.00 pm	Group Discussion
6.00 pm	END



About Bernard Fung

Bernard Fung is the Managing Director and Head of Wealth Planning Services Asia Pacific, based in Singapore. In this role he leads a team that works closely with high-networth clients to formulate and execute appropriate solutions for them in the areas of family office planning, strategic philanthropy and succession. Prior to this, he was Head of Family Office Services and Philanthropy Advisory Asia Pacific from 2011-2017. During that time, Credit Suisse consistently won industry recognition for "Best Family Office Services" (2011, 2012, 2013, 2015) and 'Best Philanthropic Services" (2011, 2012).



Mr. Fung has over 15 years' experience in private investing on behalf of organizations with a long term value added orientation. Since 2005, he was Chief Executive of Innotech Advisers Ltd, the London-based single family office and investment vehicle of Lord Sainsbury of Turville, having joined as its Investment Director in 2003. Prior to 2003, Mr Fung managed an independent venture capital fund based in New York.

Mr. Fung served as an adviser, and then as a trustee, of one of Sainsbury family's charitable trusts. From 2004 to 2010, he was Executive Director of Aquifer Limited, a GBP 50 million program-related investment vehicle funded by The Gatsby Charitable Foundation.

Mr Fung is a Singaporean and holds a Bachelor of Laws and a Bachelor of Commerce, both obtained with the highest honors from the Australian National University.

ABOUT FBN ASIA

Family Business Network (FBN) Asia is a regional chapter of **FBN International**, a private, not-for-profit organization. It is led 'By Families, For Families, Across Generations'.

FBN is the leading family business community around the world, offering a unique and safe space for its members to share best practices and progressive ideas on how to grow, succeed and prosper in their family, business and personal lives. Founded in 1989, it represents more than 13,000 individual members from more than 3,000 business families in 62 countries across 5 continents.

Its vision is to create a vibrant community of family businesses that serves as a model of success and longevity.

REGISTRATION

REGISTRATION & ENQUIRIES

Category of Participants	Registration Fees
FBNA Members & Family	WAIVED (unlimited pax)
FBNA Members' Executives	RM200 per person
YPO & EO Members	RM300 per person
Invited Guests	RM600 per person

Registration fees will be fully refunded if the participant joins FBNA within 3 months from date of event.

Registration closes on 13 May 2019.

REGISTER WITH :

FBN Asia Malaysia Representative

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