



PRIVATE WEALTH FORUM ISRAEL

Wealth Management – Real Estate – Asset Protection

30 of November 2016 ; Kongresshaus ; Zurich/ Switzerland

WEALTH MANAGEMENT IN ISRAEL

Israel may not come easily to mind when one thinks of Private Wealth Management, but it's **strong IT sector** and **ongoing immigration** from Russia, France, Germany, the US and other countries created one of the **fastest growing Wealth Hot Spots** in the World with almost **150000 High Net Worth Individuals** (more than 1 Mio USD Net worth).

Israeli new tech millionaires have high expectations of the quality of services in Private wealth management. These clients require services ranging from **Investment management, Asset allocation** and **Portfolio construction** to **Succession planning, Taxation** and **Regulation, Philanthropy** and **Asset structuring**.

AMONG SPEAKERS



Sir Roderick Balfour
TEP, Co-Founder,
Director and
Head of Business
Development at
VIRTUS Trust



Jissachar Polak
Director at Polak
**Global Investments
Review**

TOP REASONS TO ATTEND

- **Network** with Family Offices, Asset Managers, Bankers, and Investors from Israel, Switzerland, Luxembourg, Gibraltar, Russia, the UK and other countries.
- Get deep **insights** on all issues related to the management of Israeli family wealth
- Enhance **distribution channels** - Gain access to the fast growing Israeli Private Wealth Management market
- Leverage your business potential – Meet new clients and business partners



Dr. A. Lindemann
Managing Partner
at **Lindemann Law**



Maxim Simonov
Head of Tax at
Duvernoix Legal

PARTICIPANTS

- Family Offices & HNWI's
- Audit firms
- Private Bankers
- Law Firms
- Company Registrators
- Asset Manager
- Real Estate Firms
- Accounting Firms



James Lasry
Head of Funds at
Hassans Law Firm



Philip Braude
CEO at
Anglo Capital

LEVERAGE YOUR BUSINESS POTENTIAL!



DON'T MISS THIS UNIQUE OPPORTUNITY TO GROW YOUR BUSINESS!

REQUEST INFORMATION NOW!

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10:00	Forum Opening
10:05	Asset Management strategies for Israeli Family Offices and HNWI's Mr. Philip Braude, Anglo Capital/ Israel
10:25	Offshore Solutions: An Market Overview Roderick Balfour - TEP, VIRTUS Trust/ USA
10:45	Transparency and international information exchange: After the voluntary disclosure - A case study Jissachar Polak, Polak Global Investment Review/ Israel
11:05	Economic Citizenship and Residency solutions for Israeli HNWI's
11:30	Coffee break
12:00	Relocating to Switzerland for Israeli companies: An examination of the Swiss-Israel Tax treaty
12:20	Tax Aspects of Investments in Germany by Israeli Investors Dr. Judith Taic , Dr. Judith Taic Law Office/ Israel
12:40	New Swiss Anti-Money-Laudry-Rules: Impact on Israeli investors Dr. Alexander Lindemann, Lindemann Law/ Switzerland
13:00	Immigration to Israel from France, Germany, UK, USA and Russia: A Discussion of legal and economic consequences James G. Lasry, Hassans International Law Firm/ Gibraltar Maxim Simonov, Duvernoix Legal/ Russia Russian HNWI moving to Israel: Citizenship, Tax residence and bank compliance Anatoly Gakenberg, Lawyer/ Israel & United Kingdom
14:00	Break
15:00	Panel Discussion: Swiss Private Banking for Israeli HNWI's: <ul style="list-style-type: none">• Serving clients Onshore vs. Offshore• Shekel and other currency deposits• Asset allocations• Wealth Managment
16:00	Networking

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