

# WEALTH & INVESTMENT

SUMMIT 2023

9<sup>th</sup> November 2023

The Ritz Carlton JBR, Dubai  
United Arab Emirates

Organised by:

**MEAFINANCE**

Banking and Finance news in the MEA market

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MEDIA PACK

# OVERVIEW

Backed by an evolving regulatory environment and supportive national leaderships, leading economies in GCC and the wider region continue building their private banking, wealth management and investment sectors. The well-executed emergence from the challenging early days of this decade, the comparative stability of the region and the dynamics of positive demographics fostering a youthful entrepreneurial spirit further underpin the region's place among the leading global centres for wealth and investment.

The boosted provision of resources to cater to this growth, the attraction into the market of banks and investments houses new to the area and an increase in locally launched businesses, further solidified the wealth and investment credentials of the region.

As all these factors pull more investment capital into our region, so too will the sector witness the expansion of the vital technological and professional services providers it needs.

The 2023 MEA Finance, **Wealth and Investment Summit** will discuss the growth, assess the challenges and predict the future of the regional private banking and wealth services sector. Based on the lively and enthusiastic sessions at the event in the previous year, we can expect to be gifted with genuine insight, avid debate and first-class speakers from across the range of leading businesses and service providers to the market.

## FACTS & FIGURES



**200+**  
DELEGATES



**25+**  
INDUSTRY-LEADING  
SPEAKERS



**3**  
PRESENTATIONS

## WHO ATTENDS



FAMILY OFFICES



REAL ESTATE  
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VENTURE CAPITALISTS



SENIOR INVESTMENT  
EXECUTIVES



WEALTH / ASSET  
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PRIVATE BANKERS



ENTREPRENEURS



ALTERNATIVE ASSETS  
INVESTORS

## 1. Middle Eastern Succession Planning in a Growing Modern Economy.

Huge transfer of wealth across generations is taking place in the Middle East, but roughly only a quarter of the regions' HNWIs have adequate succession plans. How can this be addressed in ways that keep pace with the development of the region? What are the consequences poor succession planning on this scale, not just for relatives but for the whole region, with many families who built their wealth over recent decades owning large business employing many people? What instruments and efforts are in place or in development to make succession planning easier, attractive to families and more comprehensive in the region?

## 2. Wealth and Society Today – How ESG & Philanthropy is Changing Regional Wealth Planning

Environmental and ESG concerns of the newer generations taking over family businesses, prospering from their own efforts or inheriting wealth are increasingly being factored into their investment decisions. How are wealth managers and investors meeting these demands? Are wealth stewardship institutions leading by developing new vehicles and products, or are client requirements moulding the industry? How do regional ESG and philanthropic values differ from other parts of the world when planning and maintaining wealth?

## 3. Safe Havens in Testing Times – Opportunities to Future-Proof Investment Portfolios

Uncertainties and challenges, economic, geo-political and environmental still linger. Do traditional safe investments such as Gold, Real Estate, US Treasury Bonds, Preferred Stocks and Corporate Bonds still retain value as dependable options, might other choices supplant them or are we becoming inured to continuing instabilities and seeing investment risk aversion decline? Currently enjoying buoyant energy sectors with a resulting favourable wider economy, encouraged by business and economic reforms, are GCC states viewed as a "Safe Haven," by regional and global investors?

## 4. The Growing Role and Requirements of Family Offices in the Middle East

Family offices remain a growing presence, all aiming to service the growing numbers and needs of the prosperous in the Middle East. While there is no typical family office, with each nurturing their charges in their own way, are there common factors particular to the region when setting-up or running such a service? As the region continues to attract wealth, is pressure increasing to improve governance and transparency, and what services will family offices themselves need as their presence and activities grow here?

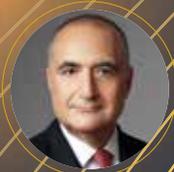
## 5. Investment Alternatives – Where are the best investing results going to come from?

Change and uncertainty are with us for the duration of the coming years, requiring keen observance of trends and attention to investment strategies. While conventional asset classes will remain central to portfolios, are there emerging alternative options that will bring better returns? Much talked of alternative investments – the Metaverse, NFT's, Tokenisation and Crypto currencies have been noticeably humbled. Will they come back refreshed, renewed and as improved investment options, or will alternatives to day-to-day asset classes only ever provide transitory peak performances?

## 6. Technology and Digitisation of Wealth Management – Harmonising New Conveniences with Traditional Service.

Digitisation technology in banking is the norm and its' uses in wealth management and investing are pretty much part of the landscape too, reflecting both conversion to its' conveniences and more digitally native generations moving into the higher net worth brackets. Nevertheless, questions remain. How will this evolution affect the way that private banks interact with clients, or change the necessary skills of wealth managers and service providers? What efforts must technology providers make to ensure their products and systems can provide the service levels, outcomes and security demanded by the wealthy clients of financial institutions?

# PREVIOUS SPEAKERS



**Alex Gemizi**  
Chief Executive Officer  
Greenstone Equity Partners



**An Kelles**  
Director - GCC  
Jersey Finance



**Arjun Mittal**  
Founder  
Abbey Road  
Investment Group



**Anita Gupta**  
Head of Equity Strategy  
Emirates NBD



**Dr. Bhaskar Dasgupta**  
Independent Board Director,  
Senior Advisor  
Sheikh Hamdan Bin Ahmad  
Al Makhtoum Private Office



**Biju Thomas**  
Senior Director, Private  
Banking  
Mashreq



**Brett King**  
Futurist, Bestselling Author,  
Founder - Moven, Media  
Personality



**Damian Hitchen**  
Chief Executive Officer  
Saxo Bank MENA



**Damien Morgan**  
Senior Wealth Planner  
HSBC



**Devesh Mamtani**  
Chief Market Strategist  
Century Financial



**Devid Jegerson**  
Head of Customer Experience and  
Platform Development  
National Bank of Fujairah



**Faisal Hasan, CFA**  
CIO, Head of Asset  
Management  
Al Mal Capital, UAE



**Farzad Billimoria**  
Head of Private Banking,  
UAE  
HSBC



**George Hojeige**  
Chief Executive Officer  
Virtugroup



**Haitham Juma**  
Unit Head - Investment  
Solutions  
National Bank of Fujairah



**Ismael Hajjar**  
Partner, Entrepreneurial Private  
Business, Family Office Services  
PwC Middle East



**Leevyn Isabel**  
Private Clients Director  
Ocorian



**Mario Al-Jebouri**  
Managing Director & Head  
of Middle East  
Banque Cantonale de  
(Genève) (BCGE)



**Mubashar Ayoob**  
Head of Wealth  
Management - Gulf  
Deutsche Bank



**Mustafa Bosca**  
Managing Director and  
Partner  
Boston Consulting Group



**Nabilah Annuar**  
MEA Finance



**Neale Croutear-Foy**  
Chief Technology Officer  
Securrency Capital



**Dr. Niels Zilkens**  
Lead Market Head Arabian  
Gulf & NRI  
UBS Global Wealth  
Management



**Omar Al-Gharabally**  
Chief Investment Officer  
Greenstone Equity  
Partners



**Rahul Chopra**  
Head of Dubai, Senior Executive  
Officer & Managing Director  
Charles Monat Associates



**Shadi AlNasr**  
Principal - Global Family Office  
The Bank of New York Mellon



**Tim Searle**  
Founder and Chairman  
Globaleye



**Samir Raslan**  
Vice Chairman of Origination  
Citi Global Wealth - EMEA



**Vipul Kapur**  
& Managing Director  
Head of Private Banking  
Mashreq

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The **2023, MEA Finance, Wealth & Investment Summit** will offer sponsors a highly visible platform from where to be seen and heard before, during and after the main event. Our comprehensive packages of benefits including speaking and audience presentation opportunities, exhibition space and an array of impactful brand exposure opportunities will promote your services into the heart of the market, direct to your target audience.

It is by far the best occasion in the regional wealth and investment calendar of events to meet, be seen and heard by key decision makers, engage with investors and to start opening doors for collaboration.

To learn more about the available opportunity packages, please contact us.

## WHY SPONSOR?



### **Create, develop and enhance stature:**

Highlight your products and services to an enthusiastic audience, build market awareness, establish networks with new prospects and build recognition as industry leaders.



### **Generate new leads to win new business:**

Create new professional relationships with an interested audience in attendance at the summit.



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### **Network amongst like-minded individuals:**

Meet and network with potential new clients at a time when their interest is at its peak, and connect with fellow sponsors and vendors to look for new partnerships.



### **Give attendees strategic insights into your business:**

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Exclusive to one company only	●			●	●	●	
Opportunity to provide Welcome Note to Audience	●						
Access to All Sessions	●	●	●	●	●	●	●
Standalone Presentation	●	●					
Panel Member in Discussions	●	●	●				
Exhibition Booth Space	●	●	●	●	●	●	●
Advert in Event Booklet	●	●	●	●	●	●	●
Logo on Website with Hyperlink	●	●	●	●	●	●	●
Logo on all Marketing Collateral	●	●	●	●	●	●	●
Branding on Post Event Report	●	●	●	●	●	●	●
<b>Cost (USD)</b>	<b>40,000</b>	<b>30,000</b>	<b>20,000</b>	<b>15,000</b>	<b>15,000</b>	<b>15,000</b>	<b>12,000</b>

# CONTACT US

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