

WEALTH & INVESTMENT

SUMMIT 2024

12th November 2024

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

The market for providing wealth management, high yield investments and services to high-net-worth individuals and families privileged with great prosperity is continuing to grow across our region. Backed by determined governments, forward thinking regulators and desirable life style opportunities that are attracting the prosperous from outside of the region, key locations in the GCC are transforming into global wealth booking centres and investment management hubs.

As the market further establishes its strengths, the gravitational pull it exerts will further attract service providers of all sizes into the region, expanding the range of options and provision for servicing the increasing wealth sector. And with new generations inheriting or generating wealth, their needs and principles will shape the future of this rapidly expanding market and how it invests. What this means for banks, private banks, investment houses, family offices, regulators and wealth technology vendors will be debated by our experienced panellists from leading businesses at the heart of this exciting and highly active market.

The 2024 MEA Finance, Wealth and Investment Summit will interrogate the growth, assess the challenges and attempt to predict the future of the regional wealth and investment services sector. Based on the lively and enthusiastic sessions at this summit in previous years, all in the presence of market professionals, business leaders, product specialists and users, we can again expect to be privileged with informed, avid debate and eye-opening insights 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
INVESTORS



PE&VC PROFESSIONALS



SENIOR INVESTMENT
EXECUTIVES



WEALTH / ASSET
MANAGERS



PRIVATE BANKERS



ENTREPRENEURS



ALTERNATIVE ASSETS
INVESTORS

AGENDA

1. Passed and Present – Succession and Estate Planning in the Middle East

With huge regional transfer of wealth across generations, there remain a majority of HNWI's with inadequate succession plans. Is this changing, and what are the immediate family and wider effects of insufficient planning? And with more regional and international HNWI and ultra HNWI individuals resident in the region, their assets will have to be included in their global tax and estate planning strategies. How well equipped is the region to ensure families can best manage their assets and wealth in the present? How, approaching 2025, does our region compare with other global hubs for such specialist services?

2. What is Private Banking Today?

With the activities of private banks, family offices, digital platforms, independent asset managers and insurance providers frequently overlapping, and once exclusive services becoming more widely available, does the term retain the meaning or the cachet it once did? Are transparency demands and growing regulatory requirements, eroding the concept of Private Banking? Is Wealth Management the better term for the times, or should defined Private Banking now require the adopting and provision of fiduciary standards, prioritising advising clients according to their needs, without hidden costs or conflicts of interests arising from specific product sales?

3. Wealth vs Society

Philanthropy is seen as a leading focus for wealthy families in the region – why is this? And given this, what are the main philanthropic motivations and directions of the HNWI's of the region as newer generations move into or inherit wealth? Are roots of societies struggles gaining more attention than the symptoms? If so, where and how will their financial power and influence be deployed to improve societal conditions? With many HNWI's migrating into the region from other countries and cultures, is the proportion of wealth dedicated to philanthropy here increasing, decreasing or remaining about the same?



4. Family Office

What factors are attracting Family Offices to set up our region? Is it the growth of the HNWI class as economies grow, individuals and families becoming more fiscally knowledgeable or cognisant of opportunities arising from better management, the resident wealthy investing higher proportions locally as regional economies grow and become more sophisticated or are there other factors such as modern and stronger regulatory frameworks? Are providers now setting up in the region coming into the game too late? Do longer established service providers have the advantage? How much room for the growth of FO service providers is there in our region?

5. Wealth Technology and AI – what it means to the market and can AI itself be an asset class

Technology and AI are embedding deeper into the region’s wealth business. Routine tasks are increasingly handled by machine, freeing wealth managers to focus more on strategy, theoretically improving service quality and results. Are there further opportunities that AI can offer to wealth managers? Can technology and digitisation foster new relationships and bonds of loyalty between wealth managers and their clients and how will it affect competition between service providers across our region? Are wealth technology and AI themselves viable asset classes, and if a positively productive investment, how long may they remain so?

6. Building Portfolios –Real Estate Investment Trends and Determining Factors

While real estate is commonly understood as an investment class, what forms does real estate investment take for the regions HNWIs? Are particular market sectors showing better promise than others and are investors looking beyond the region for global opportunities? Are REITs, either in our region or beyond still on the radar for investors and are investment decisions now being made based on sustainability or the environmental impacts of developments or projects? And what of AI – what role is this playing or expected to play in real estate investments for HNWIs?



SPONSOR

The **2024, MEA Finance, Wealth & Investment Summit** will give 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 pre-event marketing with 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 at a time of great market interest in the region.



Generate new leads to win new business: Create new professional relationships with an interested audience in attendance at the summit.



Underpin your existing client relations: Your clients will see and hear you amongst the best in the business at the most prestigious regional wealth & investment event of the year.



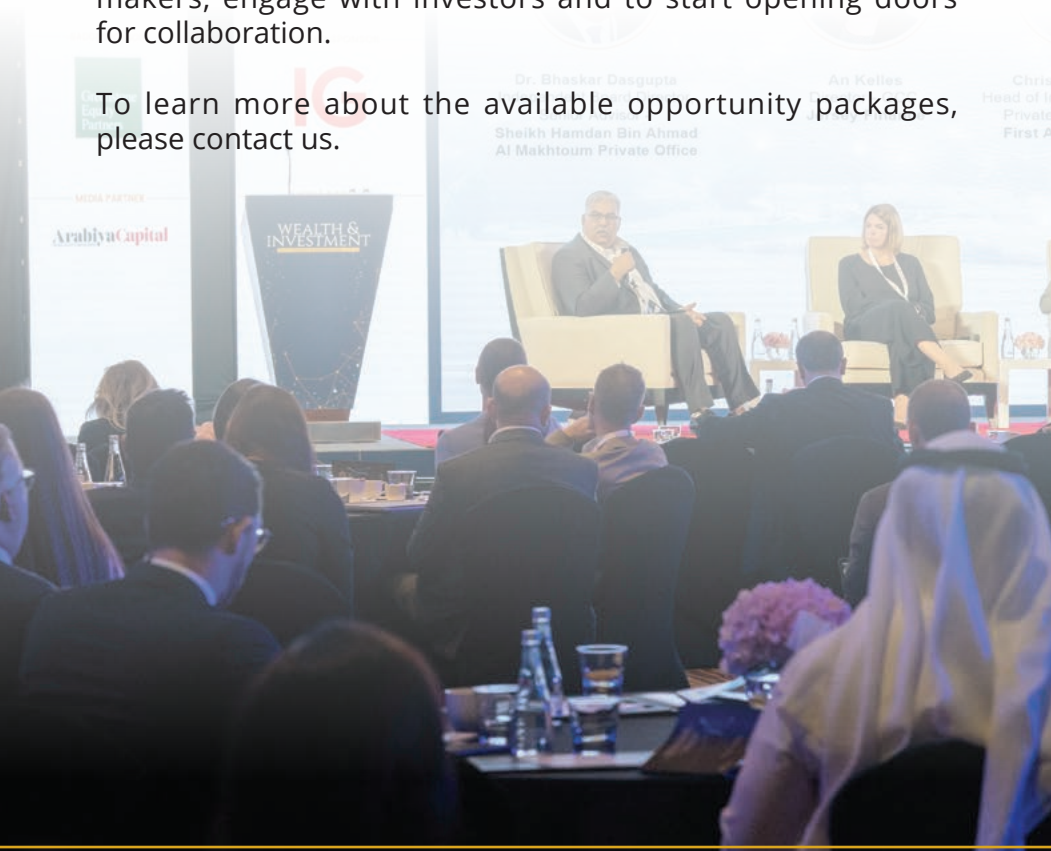
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Give attendees strategic insights into your business: Through exhibiting and sponsoring the summit, you can engage attendees, showcasing your products and services to increase positive perceptions of your activities and boost opportunities for growing your client base.



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| Opportunity to provide Welcome Note to Audience | ● | | | | | | |
| Access to All Sessions | ● | ● | ● | ● | ● | ● | ● |
| Standalone Presentation | ● | ● | | | | | |
| Panel Member in Discussions | ● | ● | ● | | | | |
| Exhibition Booth Space | ● | ● | ● | ● | ● | ● | ● |
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| Logo on all Marketing Collateral | ● | ● | ● | ● | ● | ● | ● |
| Branding on Post Event Report | ● | ● | ● | ● | ● | ● | ● |
| Cost (USD) | 40,000 | 30,000 | 20,000 | 15,000 | 15,000 | 15,000 | 12,000 |

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