WEALTH & INVESTMENT

SUMMIT 2025

6th November 2025

The Ritz Carlton JBR, Dubai
United Arab Emirates

The Future of Wealth in the Middle East

Organised by:
MEAFINANCE
Banking and Finance news in the MEA market
www.mea-finance.com

MEDIA PACK

Overview

The region is now firmly acknowledged as a global hub for wealth and investment. Indeed, two of the GCC's nations are among the globe's top ten wealth booking centres and are well set on the road to joining the world leaders.

As the market for providing services to HWWIs from our region, and those relocating to and/or investing here continues to grow, so too are those specialised services providers and financial institutions establishing their business here, or dedicating significantly more of their resources, skills and personnel to ensure they benefit from this growth.

Contributing to this expansion is the increasing application of technology and AI to the market, fuelled by its widespread adoption across retail banking and asset management and the desire to serve the upcoming younger wealth inheriting generations who have grown up with digital environments.

The long-established tradition of SMEs and family businesses here is now fizzing with creativity and growth, recognised as vital to regional economies, well encouraged by governments and enjoying easier banking experiences, all adding to the pool of emerging and existing clients for family offices, private banks and providers of wealth management services.

So, the question is no longer whether the region will become a leading centre for wealth management and investment, we already have that answer. The questions now are how much the regional wealth market will grow, what are its numerous strengths and attractions, can the region provide the skilled personal and what role will our region now play in the development and influencing of wealth management here and around the world?

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

Planning for the Future - Successful Succession

Numerous providers of succession services operate in our region with instruments and options for safely carrying a cherished legacy to future generations. However, a recent high profile succession dispute, leading to the Government of Dubai taking control of a major local business has emphatically highlighted the worrying lack of succession planning that still haunts the regional wealth market. Given the well documented, enormous regional transfer of wealth across generations taking place at this time and the increasing number of successful start-ups and family businesses, what are families doing in response to their growing awareness of the absolute necessity of thorough, successfully coordinated and cast-iron succession planning?

Faith in Your Future – Islamic Wealth Management

Sharia Wealth Management can bridge the perceived division between ethics and economic performance and as Islamic finance is grows worldwide, it follows that Sharia wealth and investment management demands the attention of investment managers across our region as growth in Shariah-compliant funds, sukuk, takaful and tailored private banking solutions for HNWIs expand. How fast and at what scale in the Islamic wealth market growing here and globally, and are the skilled personnel in place here to meet demand for Sharia wealth services? As prosperity increases bringing newer generations of wealthy into the market, could Islamic Wealth Management rival or even surpass conventional options in the region?

Family of the Future – Key Concerns and Future Priorities for Regional Family Office

The family office sector keeps growing across our region as the drivers of this growth continue to fall into place, but just how robust is this? How are family office businesses managing in the regions' highly competitive environment? Are emerging family leaders successfully balancing tradition with innovation to avoid costly conflicts and how can family officers navigate their charges through such sensitive issues? What might be the effect of ongoing geopolitical stresses and uncertainty, and how do concerns for this factor in families' investments and capital allocations? What currently are the top priorities and the leading concerns for the future for family offices and the families they serve?

Agenda

Present in the Future – The Technology of Wealth Management

What can the HNWIs of our region expect to encounter and what can they reasonably demand in terms of uniquely provided and bespoke services from technology as it levels the playing field and provides similar opportunities to broader consumer classes? What also are the main financial technology concerns of HNWIs in our region – cybersecurity and resilience, fraud or achieving the best results from AI led investing? How can financial institutions and family offices best serve the specific needs of the region's HNWIs with technology while also maintaining their special relationships, and how has their journey to digital maturity developed in the past few years?

A Better Future – Philanthropy, Ethics and Yield

Philanthropy is a serious consideration for wealthy families in our region – why is this? And given this, what are the main philanthropic motivations and beneficiaries of the HNWIs of the region as newer generations build or inherit wealth? Is addressing the causes of societal struggles gaining more attention than funding the symptoms and if so, where and how will HNWIs financial power and influence be deployed to improve societal conditions? Can investments with direct philanthropic outcomes ever be a high-yielding activity, and if so what and how? As more of the world's rich migrate to the region from other cultures, will the proportion of wealth dedicated to philanthropy here increase or decrease?

Investing in the Future – Which Asset Classes Will Stay, Which Are Coming

From where will the best performance come in the future and which alternative investments show the most potential upside? Will it be private credit with its liquidity and high yields? Is AI, quite apart from its use in the business, a promising asset class in its own right? Real estate is likely to remain strong across the region, but which of its verticals will lead in this market and what investment options will perform best – REITS, tokenisation, purchase? Will areas such as infrastructure with its stable returns be more favoured or will crypto currencies gain a bigger part of HNWI portfolios? What does the future hold for alternative investments in our region?


INVESTMENT
MIDDLE EASTERN SUCCESSION PLANNING IN A GROWING MODERN ECONOMY
Ismael Hajjar
Partner
PwC Middle East
Farzad Billimoria
Head of Private
Banking, UAE
HSBC
Neelam Verma
Senior Executive Consultant
Secura International
Nina Auchoybur
Managing Director - UAE
Ocorian
Rahul Chopra
Head of Dubai &
Managing Director
Charles Monat Associates
Tim Denton
Executive Vice President,
Head of Wealth Structuring
Habib Bank AG Zurich
mashreq


WEALTH &
INVESTMENT
SAFE HAVENS IN TESTING TIMES –
OPPORTUNITIES TO FUTURE-PROOF INVESTMENT PORTFOLIOS
additiv
Ali Jaffari
Chief Financial Officer
Ayesha Abbas
Haitham Juma
Hazem Fouad
Faisal Hasan


WEALTH &
INVESTMENT
WEALTH AND SOCIETY TODAY –
HOW ESG & PHILANTHROPY IS CHANGING REGIONAL WEALTH PLANNING
Bhaskar Dasgupta
Independent Board Director,
Senior Advisor
Sheikh Hamdan Bin Ahmad
Al Maktoum Private Office
Daniel Robinson
Head of Wealth and
Personal Banking, UAE
HSBC
Faisal Hasan
CIO &
Head of Asset Management
Al Mal Capital
Rene Van Zyl
Joint Head Tax and Fiduciary
Investec


WEALTH &
INVESTMENT
THE GROWING ROLE AND REQUIREMENTS OF
FAMILY OFFICES IN THE MIDDLE EAST
additiv
HSBC
BNY MELLON
Gavekal
nbf
seera

SPONSOR

The **2025, 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, enjoy second to none networking opportunities and to start laying the rails for collaboration.

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

WHY SPONSOR?

Create, develop and enhance market 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.

Heighten brand awareness and recognition: Benefit from the extensive pre and post event marketing activity available to you through the many sponsorship packages.

Network with 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: 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.

Sponsorship Options

Benefits	Platinum	Gold	Silver	Lunch	Lanyard	Badge	Exhibitor
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	●	●	●	●	●	●	●
Cost (USD)	**40,000**	**30,000**	**20,000**	**15,000**	**15,000**	**15,000**	**12,000**

Contact Us

FOR SPEAKING, SPONSORSHIP & EXHIBITION ENQUIRIES:

Nap Estampador
Group Commercial Director
E: nap.estampador@mea-finance.com
M: +971 50 1005488

FOR SPEAKING & AGENDA INQUIRIES

Natasha Cristi
Events Director
E: natasha@mea-finance.com
M: +971 50 303 4235

Editorial contact:
editorial@mea-finance.com

For other queries:
info@mea-finance.com

Dubai office:
Al Saaha Offices, Old Town
Island Burj Khalifa District, PO Box 487177