MEAFINANCE

WEALTH & INVESTMENT

SUMMIT 2026

12TH NOVEMBER 2026

RITZ-CARLTON JBR, DUBAI

MEAFINANCE
WEALTH & INVESTMENT
SUMMIT 2026

300+
DELEGATES

25+
INDUSTRY-LEADING SPEAKERS

3
PRESENTATIONS

WHO ATTENDS:

- FAMILY OFFICES
- SENIOR RELATIONSHIP MANAGERS
- PE & VC PROFESSIONALS
- SENIOR INVESTMENT EXECUTIVES
- WEALTH/ASSET MANAGERS
- PRIVATE BANKERS
- ENTREPRENEURS
- ALTERNATIVE ASSET INVESTORS

EVENT OVERVIEW

"May you live in interesting times", is a well-known expression where the word interesting is used mischievously to mean troubled, but in terms of the regional development of wealth and investment management, the word very much carries its true meaning as well as its sarcastic slant. While this year has seen geo-politics boost its already established impact on the Middle East, the effects on the sector here have been, in some ways, the proof of its grounding as a global centre for wealth management and investment.

There have been some short-term outflows, but the clear majority of the resident wealthy are staying put, looking at the current circumstances as an isolated challenge rather than a permanent loss of the region's long-term appeal. However, theeffects this has had, has in many cases, been to raise the levels of engagement between clients and their financial services providers as portfolios are adjusted and adapted to allow for rapidly changing circumstances.

Interesting times are also brought about by the pervading presence of AI whose inevitable progress and seemingly unlimited benefits will be readily taken up in the management of HNWIs finances. However it raises questions about how performance can be enhanced while ensuring the bespoke products and attention demanded by clients, as AI can also be a great leveller.

Adding to the interesting nature of our times is the prioritising of digital assets and tokenisation as core economic strategies, with regional governments enacting legislation and building regulatory frameworks to encourage their use. How will these assets work their ways into the portfolios and investment plans of our regions resident wealthy and prosperous communities?

It is true that questions about regional political challenges are legitimate and should always be asked, but it is equally and noticeably true that our region is once again, smartly and thoughtfully, with vigilance and innovation, maintaining its place as a global wealth hub. Maybe in this context the expression should be adapted - "May you live in interest bearing times".

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PROVISIONAL AGENDA

Panel 1: The Inheritance of Succession and Estate Planning

Nobody questions the importance of succession planning but, after all the debate and awareness raising, is it finally achieving the priority attention it requires? If it is, then what is motivating this concentration – general promotional activities, family officers and RMs placing it higher in clients "to-do" lists, legislative initiatives, increasing availability of comprehensive planning techniques, geo-political tensions or high-profile cases breaking into the public domain – or a mix of factors? What influence, if any, are next-generation heirs having on the succession plans of their testators? What does growing formal governance and the professionalisation mean for the business of succession planning in the regional wealth management sector?

Panel 2: Family Fortitude – How Regional Family Offices Thrive in the Middle East

As our region continues building on its status as a global wealth hub, how is the role of the family office here adapting to and managing the unique challenges of growth in the Middle East? For example, how do they help older family businesses transition from traditional methods toward professionalisation in family-led operations – such as hiring non-family CEOs or independent board members. How can family offices source specialised, top-level investment and legal talent in the regions' highly competitive environment? How are they working with the concerns of clients wary of the current geo-political stresses and how can they distinguish their exclusive and refined services from ever increasing competition with peers, financial institutions and the ever-advancing sophistication of AI?

Panel 3: The AI Inheritance – The Wills and Will Nots of AI in HNWI Financial Services

It is no surprise that Artificial Intelligence is taking ever-increasing roles in the financial lives HNWIs, with numerous coinciding factors each amplifying the impact it will continue to have. Some of these include the exponential advancement of technology itself, regulatory edicts and decisions allowing novel ways of conducting financial activities, newer tech-native generations moving into wealth, the highly active regional entrepreneurial environment and AIs own evolution of agency in matters relating to finance. However, the demands, requirements and responsibilities of banking and financial services for HNWIs are frequently complex, needing much more than off-the-shelf solutions. More than just the differences between automation and the human touch, what will AI bring the providers of services to HNWIs, and what will it not do that only the human can?

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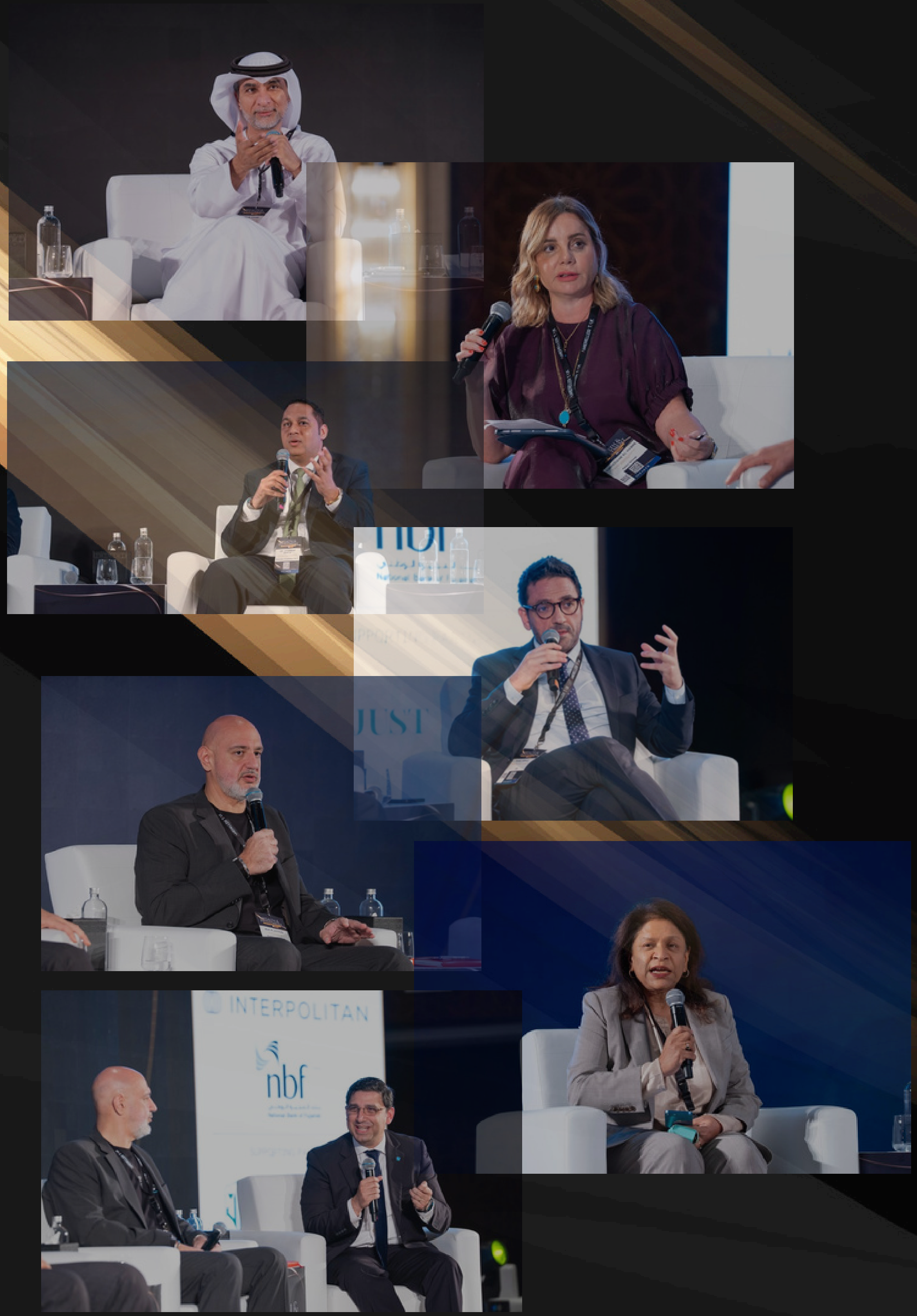

Panel 4: Living Beyond Your Means – Longevity Planning

"May you be blessed with a long life", a well-meaning blessing, the fulfillment of which could mean too much life at the end of your money. As regional life expectancy increases, post-retirement living can last multiple decades, extending daily necessities and exposure to unpredictable familial circumstances and their attendant obligations. What means are available for ensuring well-funded post working lives lasting beyond the norms of earlier generations and the staying power of long-term financial planning? Are longevity-focused insurance frameworks expanding to meet these needs in our region and what benefits do such policies offer in the wealth management context? Will the complexity of planning for a volatile future bring AI more deeply into the long-term prosperity preservation process?

Panel 5: Adapting to Circumstances – Flexibility for a Fickle World

Geo-politics upscaled its already established presence in the Middle East at the start of this year, so what has this meant for wealth and investment in our region? Shrill headlines reporting an exodus of HNWIs and their assets have fizzled into a barely audible buzz, while wealth services providers are still looking for experienced wealth management professionals. However, that isn't to say that nothing has changed, or that adaptations are not being made to allow for rapidly arising situations both here and in the wider world. In the light current circumstances, what are advisors being asked by, or suggesting to their clients in the region? Can agility and flexibility safeguard all interests now that we have the power of AI? How have recent circumstances changed the approach to wealth advisory and portfolio management in our region?

Panel 6: Digital Assets in Regional Wealth

High-net-worth individuals (HNWIs) and family offices across our region are increasingly integrating digital assets into their wealth portfolios, largely encouraged by progressive regulation and institutional-grade custody. How will digital assets develop specifically for HNWIs in our region and which parts of this sector are likely to provide the most reliable and high-value investment opportunities? How do Islamic principles align with digital assets in order to serve investors who wish to ensure acceptable Sharia compliance. Will digital assets investment be mostly driven by newer generations of HNWIs in our region, or will age not matter as long as they bring optimised returns? How are regional providers of investment and financial services to HNWIs

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WHY SPONSOR?

The 2026, 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.

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Opportunity to provide Welcome Note	✓						
Interview of Senior Representative	✓	✓	✓				
Access to all sessions	✓	✓	✓	✓	✓	✓	✓
Standalone Presentation	✓	✓					
Panel Member in Discussions	✓	✓	✓	✓			
Exhibition Space (3x2 sqm)	✓	✓	✓	✓	✓	✓	✓
Advert in Event Booklet	✓	✓	✓	✓	✓	✓	✓
Logo on website with hyperlink	✓	✓	✓	✓	✓	✓	✓
Logo on all Marketing Collateral	✓	✓	✓	✓	✓	✓	✓
Branding on Post Event Report	✓	✓	✓	✓	✓	✓	✓
COST (USD)	50,000	40,000	30,000	20,000	20,000	20,000	15,000


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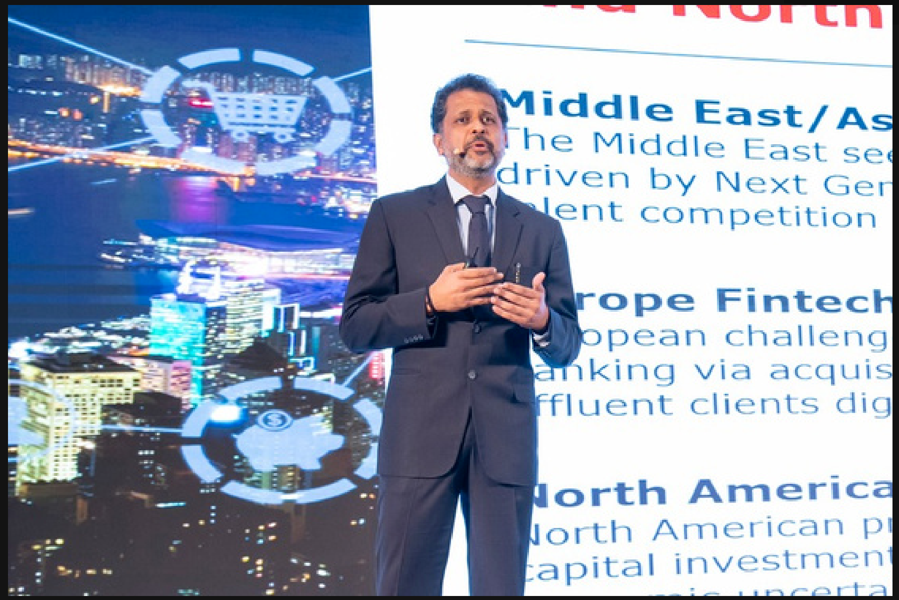
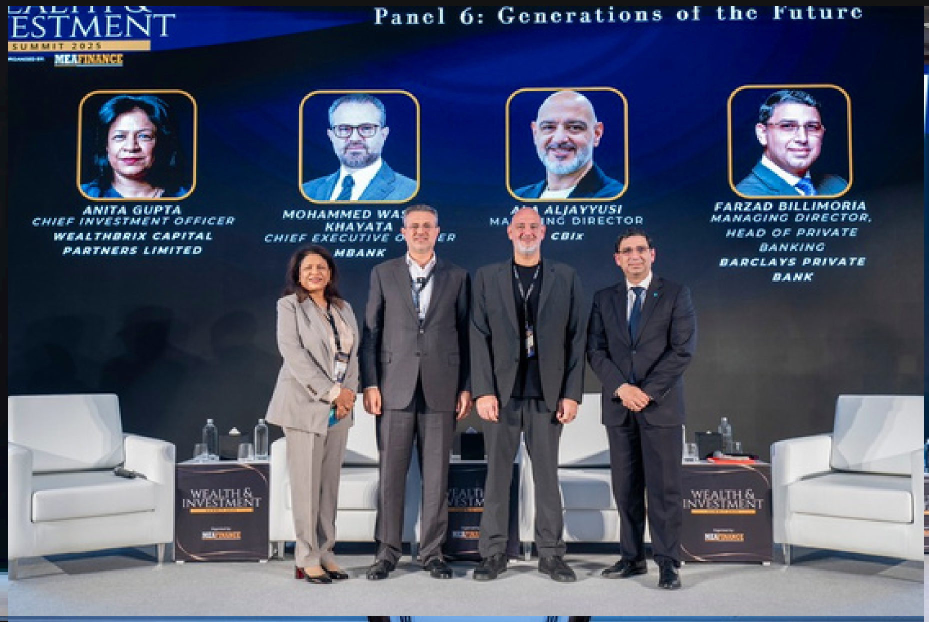
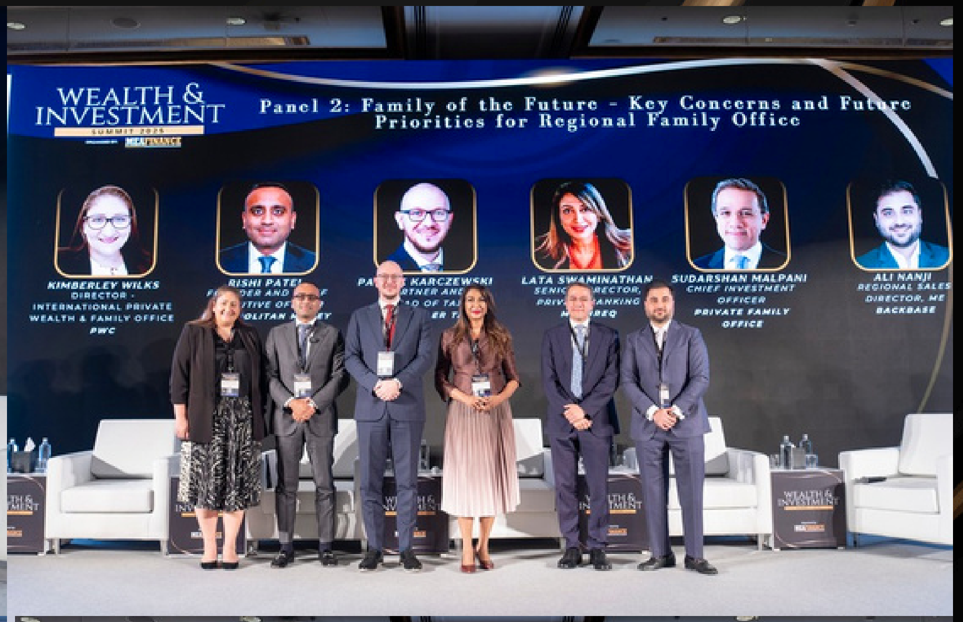

Middle East/As
North America


Legally ow assets


Panel 6: Generations of the Future
ANITA GUPTA
CHIEF INVESTMENT OFFICER
WEALTHBRIX CAPITAL PARTNERS LIMITED
FARZAD BILLIMORIA
MANAGING DIRECTOR, HEAD OF PRIVATE BANKING
BARCLAYS PRIVATE BANK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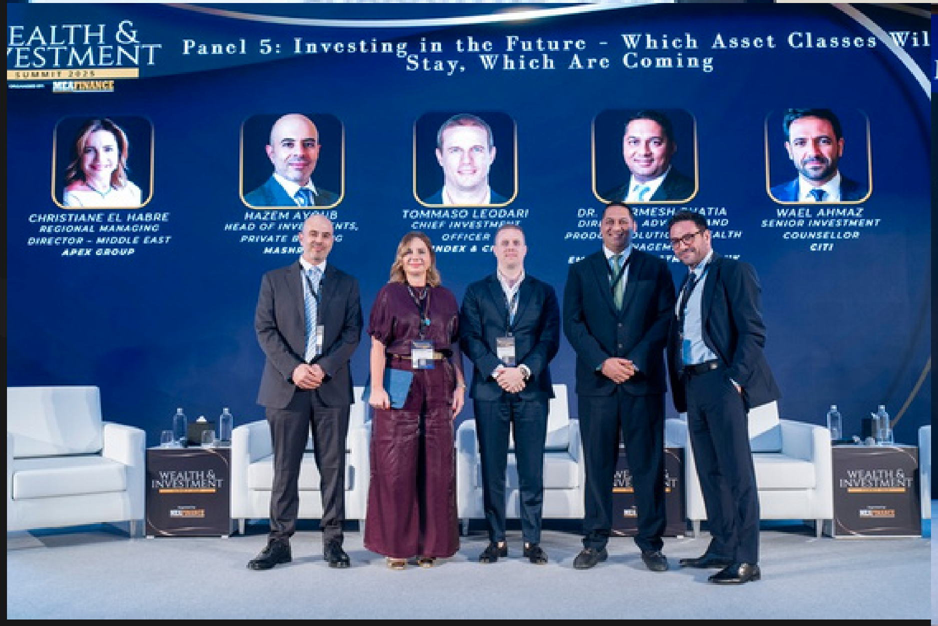
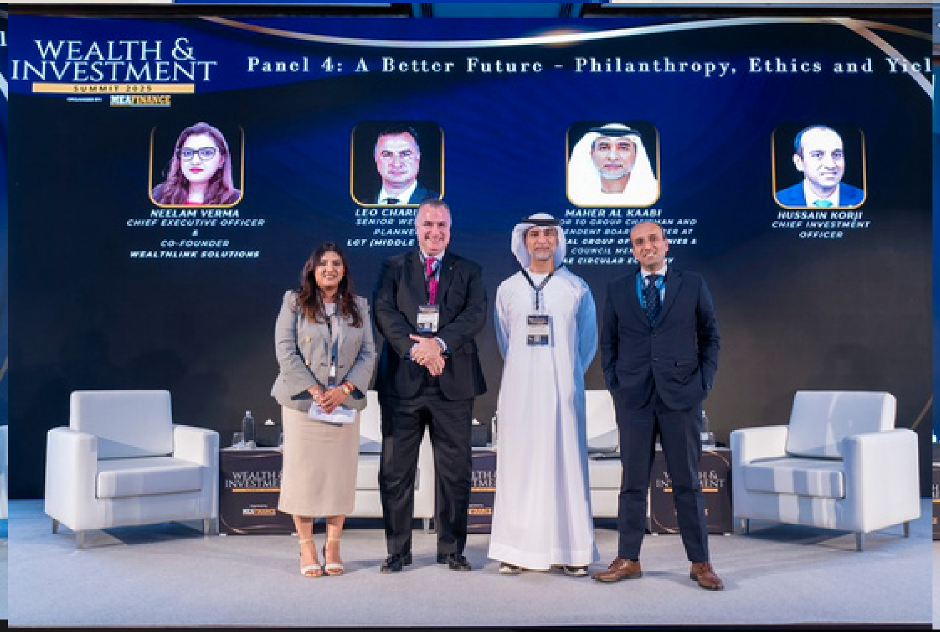
Panel 2: Family of the Future - Key Concerns and Future Priorities for Regional Family Office
KIMBERLEY WILKS
RISHI PATEL
LATA SWAMINATHAN
SUDARSHAN MALPANI
ALI NANJI


Panel 5: Investing in the Future - Which Asset Classes
Stay, Which Are Coming
CHRISTIANE EL HABRE
HAZEM AYOUB
TOMMASO LEODARI
WAEL AHMAZ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Panel 4: A Better Future - Philanthropy, Ethics and
NEELAM VERMA
CHIEF EXECUTIVE OFFICER
CO-FOUNDER
WEALTHLINK SOLUTIONS
MAHER AL KAABI
HUSSAIN KORJI
CHIEF INVESTMENT OFFICER


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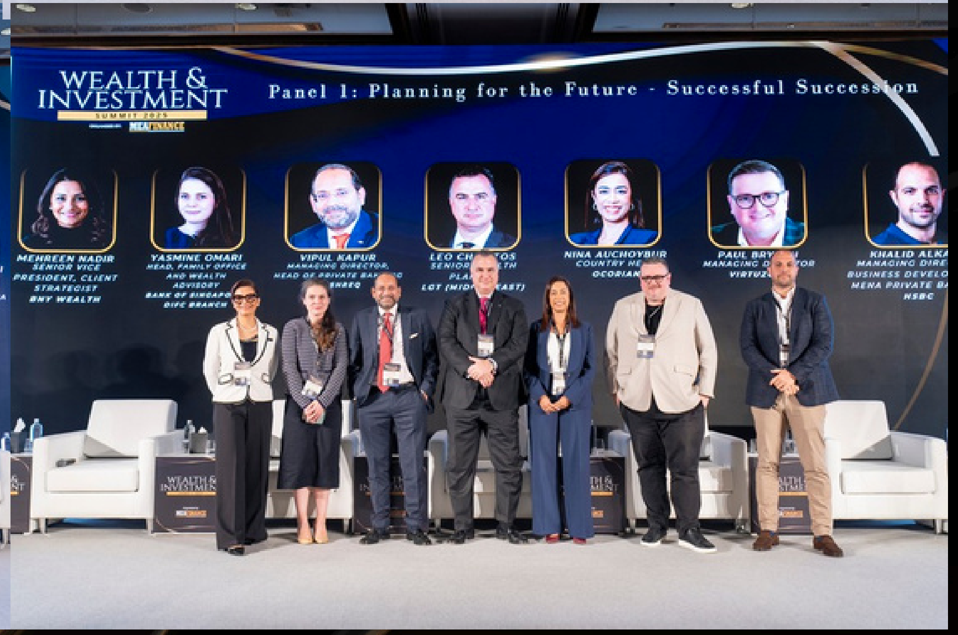
Panel 3: Present in the Future - The Technology of Wealth Management
BRYAN STIREWALT
ZUBIN MURIYA
ALADDIN HANGARI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Panel 1: Planning for the Future - Successful Succession
MEHREEN NADIR
YASMINE OMARI
VIPUL KAPUR
NINA AUCHOYBUR

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