

About the Speakers/Facilitators

(alphabetical by surname)



Ms. Elizabeth Chong TEP

VP, Head of Business Development, **Butterfield Trust (Asia) Limited**

Ms. Elizabeth Chong is the Vice President and Head of Business Development at Butterfield Trust (Asia) Limited, where she is responsible for driving strategic growth and cultivating client relationships across the region. She began her career in institutional trust services, focusing on the administration of corporate and fund structures, before expanding her expertise over more than 15 years in trust administration with both bank-owned and independent trust companies in Singapore. Elizabeth brings a well-rounded background spanning business development, client services, and trust administration. She has extensive experience advising ultra-high-net-worth families and managing bespoke wealth structures. She holds a Bachelor's degree in Business from Nanyang Business School and is a member of the Society of Trust and Estate Practitioners (STEP). Elizabeth is also currently serving as a sub-committee member of the External Relations team at STEP Singapore.



Mr. Goh Yong Sen

Executive Director, Head of Trust Structuring, **EFG Wealth Solutions (Singapore)**

Mr. Goh Yong Sen has over 2 decades of experience in the Financial Services, Wealth Management and Fiduciary Services industry. Yong Sen began his career in the financial services industry before embarking on a wealth planning career with various global financial institutions including Citibank, ANZ and independent trust companies Vistra & Zedra advising clients on legacy and succession planning matters. With a primary focus on the North Asian market, he advises families across Asia on their legacy planning needs and setting up their ideal trust structures. Yong Sen holds a bachelor's degree in computing from Monash University and is a Chartered Secretary of Singapore. He is also a qualified Trust and Estate Practitioner (TEP) with STEP.



Ms. Guo Jiawen

Head, Family Office & Structuring Solutions, Senior Wealth Advisor, Executive Director, **Bank of Singapore**

Ms. Guo Jiawen has been working on complex estate and succession planning engagements for wealthy families for more than 15 years. She was a most recently a wealth planner with a leading global private bank. Jiawen's experience in private banking and working in leading Singapore and international law firms as a tax and private wealth lawyer provides a global perspective, as she has advised both multinational corporations and ultra-high net worth families. Jiawen's legal background enables her to navigate intricate legal and tax landscapes to deliver solutions that suit her clients' needs. Her expertise lies in complex tax structuring and succession planning strategies, including the establishment of family offices, trusts to hold bankable and non-bankable assets on a cross-border basis and the establishment of philanthropic vehicles. Jiawen was the sole practitioner awarded by The Legal 500 in the category of Next Generation Lawyer for Private Wealth in 2017 and 2018. Additionally, Jiawen was a contributor (with 3 others) to Vol. 16(2) Revenue and Taxation: Income Tax, Halsbury's Laws of Singapore (LexisNexis Singapore, 2017) and is also a member of the Society of Trust and Estate Practitioners (STEP). Jiawen is fluent in English and Mandarin.



Mr. Lin Wei En

Resident Manager, **Portcullis Trust (Singapore) Ltd**

Mr. Lin Wei En is a Resident Manager at Portcullis Trust (Singapore) Ltd with over ten years of experience in the trust industry. He transitioned into private trust from a background specializing in accounting and tax, providing him with a practical understanding of wealth and estate planning. He is a Trust and Estate Practitioner (TEP) and a full member of STEP. His professional certifications include the IBF Advanced (IBFA) designation for Wealth Management and the WMI Advanced Certificate in Trust Services. To further his technical knowledge of the fiduciary landscape, Wei En is currently completing his LLB.



Mr. Hon Yong Sheng

Partner, Private Client and Tax, **Withers KhattarWong LLP**

Mr. Yong Sheng Hon is a partner in the Private Client and Tax team at Withers KhattarWong. Dual qualified in Singapore and England and Wales, and fluent in English and Mandarin, he advises ultra high net worth individuals and families on trust, tax and estate planning, family governance, charitable structures, and Singapore immigration matters. Yong Sheng regularly assists clients with the establishment and restructuring of family trusts, drafting of wills and lasting powers of attorney, and the setting up of Singapore based family offices and private trust companies. He also advises on tax efficient investment holding structures, including applications for Singapore Section 13 tax incentives, covering investments across listed securities, private equity and ESG assets globally. With extensive experience in cross border matters, Yong Sheng has strong working knowledge of key issues involving the UK, US and PRC, including Hong Kong, and is well placed to deliver tailored, practical solutions aligned to each client's personal and family objectives.



Ms. Michelle Lau

Managing Director, Co-Head Wealth Planning APAC, **UBS Global Wealth Management**

Ms. Michelle Lau has been a Trust and Estate practitioner for over 3 decades. She spent most part of her career in HSBC Private Banking, managing the Wealth Planning and Trust business for Asia Pacific. She took on executive leadership roles in HSBC Trust company(s), sitting on the boards of the various Trustee entities with duties and accountability as Director and regulatory oversight. Prior to joining UBS, Michelle was the Chief Executive of Howden Private Wealth - an independent global insurer, re-insurer and risk consultant. An extension of her Wealth Planning capabilities and management experience, her ambit covered the business in South East Asia and Dubai International Financial Centre (DIFC) - partnering Private Banks, Family Offices, law firms and tax professionals. Michelle joined UBS in 2022 and is based in Singapore. She heads up the Wealth Planning team to handle the growing client needs and hybrid structuring for inter-generational wealth transfer, including but not limited on advice to navigate the complexities of business and estate succession plans with Trusts/Foundations, alternative estate planning tools, Family Office and the on-going governance. Michelle holds a Bachelor degree from W. Australia and Master degree in Business from Singapore Management University. She is a member of the Society of Trust and Estate Practitioners (STEP) since 2001 and a senior member of the Global-Asia Family Office Circle as part of UBS Partnership with Wealth Management Institute (WMI).



Mr. Tom Zierer

Senior Executive Director, **Praxis**, Hong Kong

Mr. Tom Zierer serves as Senior Executive Director in Hong Kong SAR, focused on business development and cross-border structuring in Asia and works closely with intermediaries and clients to deliver structuring solutions that support local and international clients with structuring for asset protection, succession planning and long-term wealth preservation. Prior to relocating to Hong Kong SAR in 2025, Tom was Client Relationship Director in Praxis' Guernsey office, providing director and trustee services to a diverse portfolio of private clients and high-net-worth individuals. His expertise encompasses various asset classes, including commercial property, complex investment structures, and luxury assets and is equipped to deal with complex transactions. In addition to managing client structures and ensuring exceptional service delivery, Tom led a team dedicated to maintaining the highest standards of client care. He is also a member of the Chartered Governance Institute.

About the STEP Singapore Branch Representatives



Ms. Angela Koh

Vice-Chair, **STEP Singapore** and Chair of Membership Engagement Sub-Committee; Head of Wealth Planning and Family Office Advisory Services, **UOB Private Bank**

Ms. Angela Koh is the Head of Wealth Planning and Family Office Advisory Services at UOB Private Bank. She has been advising private bank clients with multi-jurisdictional family members and assets with regard to their succession, estate planning and family governance concerns for over 25 years - working at Union Bank of Switzerland, UBS AG, American Express Bank and Standard Chartered Bank prior to joining UOB in 2019. Angela holds a Bachelor of Laws from the University of London and is one of the initial members of the Singapore Chapter of STEP before it was converted to a full branch in 2012. She is also a senior member of the Global-Asia Family Office Circle which is a network platform that aims to be the leading voice and umbrella association for family offices in Singapore and Asia.



Mr. Alvin Lim

Co-Chair, STEP Singapore Young Professionals Network; Senior Director, Wealth Planning, Family Office & Insurance Solutions, **DBS Private Bank**

As a Specialist in the Wealth Planning Solutions Hub, Mr. Alvin Lim designs and executes sophisticated succession strategies for high-net-worth families. He integrates complex legal, tax, and regulatory considerations with industry best practices to deliver tailored solutions that meet each family's unique succession objectives. With extensive experience as a leading private wealth lawyer in Singapore, Alvin has guided families through every stage of their wealth transfer journey. This includes establishing multi-jurisdictional structures, overseeing their operation, and navigating sensitive situations such as family disputes, inheritance litigation, and mental capacity concerns. His expertise extends to both contentious and non-contentious matters, including obtaining guidance from the Singapore High Court on intricate trust cases.



Mr. Shawn Wang

Committee Member, **STEP Singapore**; Managing Director, **Lion Trust (Singapore) Ltd**

Mr. Shawn Wang TEP is a Managing Director of Lion Trust Singapore, where he oversees the firm's trust business across client services, business development, and compliance. He also serves as a board director and resident manager of the company. With over a decade of experience in trust and wealth planning, he advises ultra-high-net-worth families, entrepreneurs, and family offices across Asia on cross-border fiduciary structures spanning private trusts, PTCs, and Private Unit Trusts. He has held senior leadership roles in MAS-licensed trust companies, including as resident manager and board director. Prior to LionTrust, he led the private clients team at Ocorian Singapore. Shawn currently serves as a committee member of STEP Singapore.