Key Insights for Serving HNW Clients & Family Offices

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PIONEER
Training & Consultancy Pte Ltd
We Provide Quality Training

TRAINER INTRODUCTION

PIONEER
Training & Consultancy Pte Ltd
We Provide Quality Training

Formerly;

- COO of OrangeTee & Tie
- Board of Director, OT Group
- Board of Director, OrangeTee & Tie (JV)

- MD of a GeoSpatial Technology Firm (Partnership & Public-Private Partnership)

- EXCO Members of SEAA & IEA
- CEA ADEPT Workgroup Member

- Student Mentor, Kingston University

Currently;

- Senior Consultant, ERA Singapore
- Strategic Advisor, ERA Malaysia

- Real Estate Business Coach
- Real Estate Agency Business Advisor
- Overseas Investment Consultant (Malaysia, Phnom Penh & Australia)

- RIA RES Lecturer
- RIA CPD Trainer

- Founder, ThinkBox Solutions
- Co-founder, Crunchie Meltz
- Co-founder, JSProperty.sg

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Learning Outcomes

Learners will be able to:

Understand the key characteristics, motivations, and profiles of HNW clients and Family Offices.

Identify property preferences and investment behaviours of HNW individuals in different market segments.

Apply knowledge of ownership structures and regulatory considerations in HNW property transactions.

Recognise the role of various stakeholders involved in Family Office decision-making.

Demonstrate awareness of compliance requirements including KYC, AML, and CFT when handling high-value clients.