



INTERNATIONAL INVESTING SYMPOSIUM

Tuesday, 30 September 2025
Mount Nelson Hotel, Cape Town

Time	Subject Matter	Speaker/s
08h00	Registration	
08h50	Opening remarks	Cobus Kruger Purple Wealth
09h00	An update on South African exchange controls and grey listing status <ul style="list-style-type: none">Exiting grey listing and restoring SA's financial credibilityLatest exchange control developments	Marina Loots Exchange Control Advisory Hub
09h30	South African trust distributions to offshore trusts <ul style="list-style-type: none">Distribution of funds to non-resident trusts by resident trusts and tax implicationsTax risk and mitigationCase study and success stories	Lauren Walker Currency Partners Grant Ward Moore South Africa
10h15	Comfort break	
10h45	Situs tax and US grantor trusts <ul style="list-style-type: none">Defining federal estate taxPractical and cost implicationsHow to pay US beneficiaries from an offshore trust	Stanley Barg Kozusko Harris Duncan (KHD) Erich Bell Werksmans Attorneys Moderator: Theunis Ehlers Citadel
11h15	Introducing Singapore and the legal concierge for family offices <ul style="list-style-type: none">Introducing Singapore as a viable offshore jurisdiction for South African clientsSuitable Singaporean structuresPotential investment opportunities from Singapore	Diana The Hui ling The Legal Concierge LLC
11h45	Easy access to the growing international private asset market <ul style="list-style-type: none">The case for private versus public marketsLiquidity in private marketsHow to access and price investments in private markets?	Premal Vadgama Euroclear Group
12h15	Lunch break	
13h15	Technical financial advisor support <ul style="list-style-type: none">Removing the complexity of doing business internationally through advisor support initiatives	Tokkie Kasselmann Glacier International Eugene Taljaard Momentum Wealth International Albert Coetzee Ninety One Cherie-Lee Stratford Standard Bank International

		<p>Moderator: Marcel Bradshaw Bradshaw Investment Consulting</p>
14h00	<p>International platforms and technology</p> <ul style="list-style-type: none"> • International technology providers operating in the South African market • Localising international platforms for the complexity of the South African market • Onshore and offshore convergence 	<p>Quin Hendrickse Kane Solutions Stuart Micali SS&C André Nortjé Strate</p> <p>Moderator: Hymne Landman Momentum Wealth International</p>
14h45	Comfort break	
15h15	<p>Regular saving directly offshore</p> <ul style="list-style-type: none"> • Why consider regular savings • Pitfalls of regular savings directly offshore • Technology as an enabler 	<p>Simon Hills and David Mackenzie Dominion Capital Strategies</p>
15h45	<p>Personalised securities portfolios</p> <ul style="list-style-type: none"> • State of the South African offshore market invested in direct securities • Most popular mandates • Challenges of dealing with South African offshore platforms and endowments 	<p>Chris Trower Canaccord Mervin Naidoo Standard Bank Stockbroking Michael Hunziker Swissquote South Africa</p> <p>Moderator: Cobus Kruger Purple Wealth</p>
16h30	Closing remarks	Cobus Kruger Purple Wealth
16h40	Industry networking	

