

Islamic *Finance*.de

Islamic Wealth Management – June, 8th/9th 2005

Islamic Wealth Management



Venue: Mandarin Oriental Hotel du Rhône, Geneva, Switzerland
Organiser: Michael Gassner Consultancy, Cologne, Germany

- ◆ Islamic Finance is a rapidly growing market of more than US\$270mn
- ◆ What are the principles and objectives of Islamic Finance?
- ◆ Which products are available for High Net Worth Individuals?
- ◆ What do I need to know to advise Muslim clients?

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Background:

Islamic Finance is a rapidly growing industry. Each month new Islamic banks are founded, new Islamic bonds are issued, and more and more European banks and financial institutions are involved.

How could you advise Muslim clients on their financial requirements? Learn the rules and principles used in Islamic Finance to select Shariah-compliant products.

The Programme:

This 2-day seminar will provide an in-depth understanding of the concepts, reasoning and market acceptance of Islamic financial products. We will discuss which products fit into a balanced portfolio; and what's still missing.

- 8.30 **Welcome Note and Coffee**
- 9.00 **Introduction Islamic Finance**
by Michael Saleh Gassner, IslamicFinance.de, Cologne
- ✓ Islam, Economics and Finance
 - ✓ Basic buzz words explained
- 9.45 **Development and distribution of Sharia compliant products**
by Dr Humayon Dar, Vice-President Dar Al Istithmar Ltd., London
- ✓ The role of banks and sharia scholars
 - ✓ The importance of a "Fatwa", a sharia scholar opinion on financial products
 - ✓ Key success factors for the saleability of Shariah compliant products
- 10.30 **Markets & Clients**
by John A. Sandwick, Encore Management, S.A, Geneva
- ✓ Typology of clients and markets
 - ✓ 1st generation, 2nd generation, female clients, institutions
- 11.15 **Market Sizes, Datas and Information**
by Rakiya Sanusi, IFIS, London
- ✓ Market sizes in the GCC, Southeast Asia and Europe
 - ✓ Sources of information – media overview
 - ✓ Presentation of IFIS system
- 11.45 **Wealth in the here and in the hereafter – the Islamic view**
by Michael Saleh Gassner, IslamicFinance.de, Cologne
- ✓ Islamic approach to wealth
 - ✓ Need for wealth protection, accumulation, preservation and distribution
- 12.15 Question & Answers
- 12.30 Lunch

- 11.30 **Asset Class V: Hedge Funds**
by Michael Saleh Gassner, IslamicFinance.de, Cologne
✓ Publicly discussed products: Shariahfunds + Sedco
✓ Basic methodology used for market neutral funds
- 12.00 **Lunch**
- 14.00 **Asset Class VI: Direct Investments**
by John A. Sandwick, Encore Management S.A., Geneva
✓ Real Estate Transactions, Sizes and Requirements
✓ Companies, Selection Criterias and Preferences
- 14.45 Coffee Break
- 15.15 **Outlook: What is the future of the Muslim HNWI market?**
By John A. Sandwick, Encore Management S.A., Geneva
✓ Product range urgently needed to create more efficient portfolios
✓ Are investors going to be stricter with Islamic requirements?
✓ Common misunderstandings and misconceptions about Muslim clients
- 16.00 **Wrap Up of the Course**
by Michael Saleh Gassner, IslamicFinance.de, Cologne
✓ Summarizing main issues of the seminar
✓ Asset Classes, Islamic requirements, tax and inheritance Management
- 16.30 *Question & Answers*

The Participants:

This 2-day seminar is targeting private bankers, asset managers, and all financial professionals responsible for managing wealthy high net worth Muslim clients.

Past participants come from a number of European financial institutions, such as DZ Bank, WestLB, Deutsche Bank, L-Bank, Hypo Real Estate and others.

"A very useful work shop because of the interesting and highly qualified speakers",

*Hubert Beyerle, Financial Times Deutschland
about the Global Sukuk Workshop*