



NEXT GEN PROPOSAL

Preparing Tomorrow's Stewards Today

Building knowledge. Strengthening legacy.
Creating impact that lasts.



A GENERATIONAL TRANSFER
Asia's greatest wealth transfer is shaping a new era of stewardship



UNDERSTAND THE PAST
Know how wealth was built and structured



NAVIGATE TOMORROW
From markets to digital assets and ESG—prepare for what's next



BUILD FOR THE LONG TERM
Family businesses and portfolios for generations to come



MORE THAN WEALTH
A transfer of capability, judgment and values



**STRONGER
FAMILIES**



**SMARTER
DECISIONS**



**SUSTAINABLE
LEGACIES**



**GREATER
IMPACT**

Asia's private wealth is entering its largest intergenerational transfer in history, with family businesses and portfolios increasingly being handed down to a generation that grew up in a very different investment landscape than their parents. Many next-gen inheritors are exposed to family wealth without a structured platform to understand how that wealth was built, why it was structured the way it is, or how to steward it responsibly going forward.

At the same time, this generation faces a landscape their parents didn't: faster market cycles, digital assets, ESG considerations, and family businesses that increasingly need to be reimagined rather than simply continued. Without deliberate preparation, legacy planning risks staying one-directional, a transfer of assets rather than a transfer of capability, judgment, and values.

This gap is the reason the programme exists: not to teach investment theory in the abstract, but to give this specific cohort (aged 21–25, at the cusp of taking on real financial responsibility) a structured, credible space to start building that capability before they inherit it.



The Objectives

1. **Successful legacy planning** is reflected in the success of the next generation.
2. **Equip next-gen wealth stewards** with the knowledge, perspective, and confidence to navigate today's evolving investment landscape.
3. **Enable informed financial decisions** that build lasting family legacies.



The Target Audience

1. **Life stage transition**, recently graduated or early in their careers, and beginning to be exposed to family financial responsibility.
2. **Digital native, low structured exposure** comfortable with digital tools and information, but lacking structured knowledge of wealth management or legacy planning.
3. **Future decision makers, not yet active ones** not yet in control of family assets, but at a critical stage to be prepared before wealth transfer occurs



The Key Activities

1. **Foundations of Investing** : core investment concepts including asset allocation, risk & return, and AI/technology trends
2. **Preserving Wealth Across Generations** : succession planning, family governance, and an interactive case study.
3. **Beyond Wealth: Responsibility, Leadership & Legacy** : panel discussion on transitioning from beneficiary to steward, closing with a networking dinner



The Agency Scope of Work

Event Conception

Creating an event concept that aligns with the brief while also making a lasting impression.

Creative Design

Develop creative of key visual and key message

Event Production

Building an eye catching totem that fits the theme while also reflecting the impression of the key visual.

Show Management

Organizing the event smoothly and warmly, with the event's success as the top priority.



BE YOUNG WEALTH

*Empowering the Next Generation to Lead with Vision,
Purpose, and Legacy.*

BE YOUNG WEALTH is a call to action that encourages the next generation to redefine what it means to be truly wealthy. More than inheriting financial assets, it is about embracing the mindset, values, and leadership required to create sustainable success and meaningful impact.

The word "BE" inspires participants to become proactive leaders, while "YOUNG" represents a generation that is innovative, forward-thinking, and ready to shape the future. "WEALTH" extends beyond financial prosperity to include knowledge, relationships, responsibility, and legacy.

Through expert insights, interactive discussions, and exclusive networking opportunities, the programme empowers future leaders to navigate wealth with confidence, purpose, and a long-term vision.

BE YOUNG WEALTH symbolizes a new generation of wealth—one that is driven not only by financial achievement, but also by character, responsibility, and leadership.

OCBC Private Bank Next Gen is an exclusive programme for private banking clients' successors (aged 21–25), designed to prepare them to responsibly manage and carry forward family wealth.

Background: Next-gen inheritors are increasingly exposed to family financial responsibility, but often lack structured knowledge of wealth management or family governance, especially amid a fast-changing investment landscape their parents didn't face (digital assets, AI, faster market cycles).

Objective: Equip participants with the knowledge, perspective, and confidence to navigate today's investment landscape, make informed financial decisions, and build lasting family legacies, shifting their role from passive heir to active steward.

Strategic value: Beyond financial education, the programme builds long-term client trust with the next generation ahead of major wealth transfer, positioning OCBC Private Bank as a cross-generational family partner.

OCBC
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ACTIVITY

**OCBC
PRIVATE
BANK**

Date | Time

15 September 2026 | 11.00 - 19.00 WIB

Venue

The Langham Jakarta Hotel

Key Point

OCBC NEXTGEN

Event Contents

- Dining & Networking
- Learning Sessions
- Interactive Activities

Target Audience

15 pax (

VENUE



District 8, SCBD, Lot 28, Jakarta 12190, Indonesia



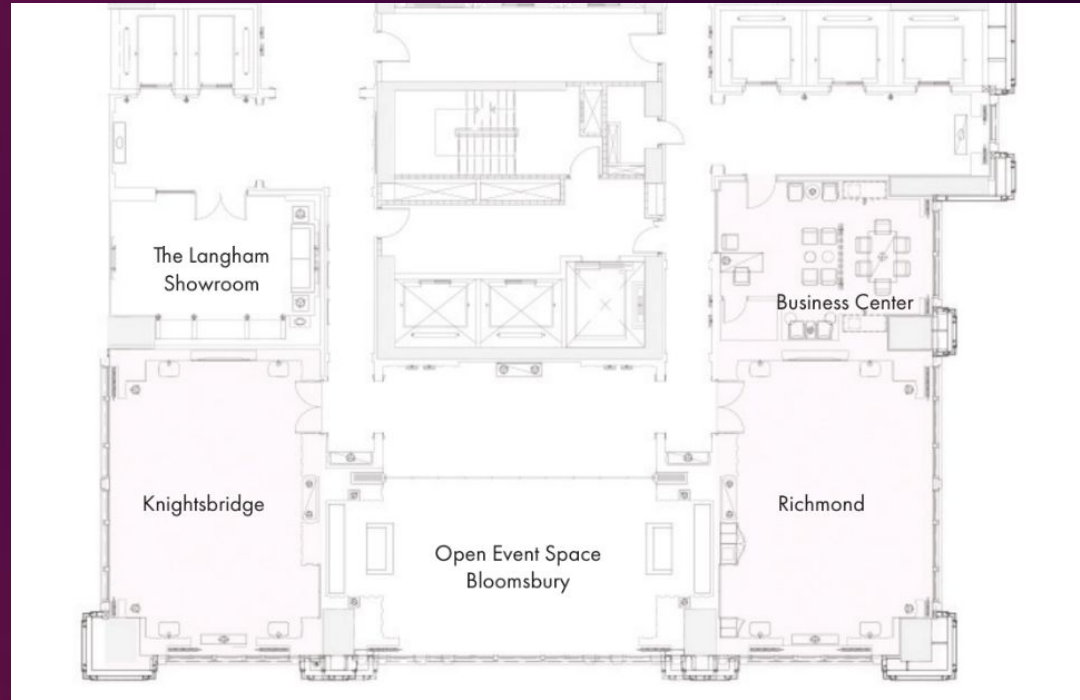
THE LANGHAM
JAKARTA



VENUE LAYOUT

The Langham Jakarta 5th floor

- Bloomsbury
- Richmond
- Knightsbridge



BANQUETING / EVENTS	LOCATION	SQUARE METERS	BOARDROOM	BANQUET	THEATRE	CLASSROOM	RECEPTION	U SHAPE
Bloomsbury	Level 5	60	22	30	50	30	50	24
Richmond	Level 5	66	22	30	50	30	50	24
Knightsbridge	Level 5	63	22	30	50	30	50	24

TIME	PROGRAMME	SPEAKER
11.30am	Guests Arrivals and Registration (include welcome coffee break / canapes)	
12.00pm	Welcome Lunch and Welcome Address Investing with Clarity: Building Foundations for Long-Term Wealth Stewardship • To cover why this programme exists • Challenges facing next generation wealth owners • Opportunities in Indonesia and Singapore • Importance of financial literacy and stewardship	Fernando Kresna Baay (opening speech) Claude Harbonn Thadly Chandra
1.30pm	Foundations of Investing Brief introduction to: • Asset Allocation • Public vs Private Markets • Risk & Return • Long-term investing principles • AI and technology trends	Werner Deprez Claude Harbonn Thadly Chandra
3.00pm	Preserving Wealth Across Generations • Why families lose wealth • Succession planning • Trusts and Structures • Family governance • Preparing heirs for responsibility • Interactive case study – Small groups receive a family scenario (i.e, founder retiring/ multiple heirs/ different risk appetites/ overseas assets)	Guo Jiawen and Wiko Harry Tanata (fireside chat, Wiko as moderator)
4.30pm	Afternoon Tea Break	
4.45pm	Asset Allocation Game	Werner Deprez
5.30pm	Fireside Chat Dialogue: Asset Allocation in Practice	Werner Deprez Thadly Chandra
5.45pm	Beyond Wealth: Responsibility, Leadership & Legacy • Transitioning from beneficiary to steward • Family expectations • Difficult conversations • Building a personal identity beyond wealth	Proposed Panelists: -Successful next gen business owner (OCBC ID to find) -Guo Jiawen -Moderator: Claude Harbonn
6.15pm	Closing remarks by Pak Ferry	Fernando Kresna Baay
6.30pm	Transfer to Dinner venue	To be arranged by OCBC Indo team
7.00pm	Dinner at Mezzanine, Tom Aikens resto (No parents, more for RM networking with participants)	Private dinner, at mezzanine level

RUNDOWN

Beyond Wealth: Responsibility, Leadership & Legacy

Successful next gen business owner *

Felicia Putri Tjiasaka



Head, Family Office and Structuring
Solutions at Bank of Singapore
Guo Jiawen



Moderator: Claude Harbonn



SPEAKER OPTIONAL

Founder Of



Felicia Putri Tjiasaka

IG : [@feliciaputritjiasaka](https://www.instagram.com/feliciaputritjiasaka)
655k Followers



**Gerakan
Memutus Rantai**



**Friday
Creamery**

Felicia Putri Tjiasaka is an Indonesian entrepreneur, investor, and financial educator dedicated to making personal finance and investing more accessible for young Indonesians. As the Co-Founder of Ternak Uang, she has built one of Indonesia's leading financial education platforms, empowering millions to improve their financial literacy through practical and relatable content. She is also an active startup investor and public speaker, recognized for inspiring the next generation to build sustainable wealth through informed financial decisions.

THANK YOU



BE YOUNG WEALTH