

# **The Great Global Wealth Transfer Speakers**

**Maya Imberg, Director, Wealth X**



Maya Imberg is Senior Director of Thought Leadership and Analytics at Wealth-X. She is responsible for driving thought leadership, using data analytics to showcase the company's products and services, and fostering knowledge sharing between Wealth-X and client organizations. Maya has fifteen years of experience in research, spanning market research, macroeconomics and financial services. Prior to joining Wealth-X, Maya held Senior Consultant and Economist roles at the Economist Intelligence Unit and spent a number of years within Datamonitor's Financial Services practice. Maya holds an undergraduate degree in Economics from the University of Pennsylvania and an MSc in Comparative Politics from the London School of Economics. She speaks Spanish and Portuguese and has worked in China, the US and Belgium.

**Vignesh Vijayakumar, COO of a Single Family Office, Middle East**



Vignesh is an accountant by training, qualified trustee and an ex banker who has worked in the City of London for a number of years and have also spent time in the Jersey, Isle of Man, Canada and Bermuda. Vignesh now heads up the operations of one of the largest single family offices in the middle-east/GCC region. Their family is intergenerational and the investment office is one of the most sophisticated investment offices in the region. The office manages a multi-asset portfolio built on the Yale endowment model with exposure to hedge funds, private equity, real estate, venture capital, private debt, fixed income and public equities.

He heads up the operations for the investment office, private office and the foundation. He manages a team of professionals focusing on investments, finance, risk & reporting, in-house legal, tax, trust affairs, real estate and foundation.

**Steve Sokic, Group Head of Private Wealth, IQ-EQ (moderator)**



Steve is IQ-EQ's Group Head of Private Wealth, is chair of its Family Office Committee and sits on its Group Management Board. He joined IQ-EQ in 2019 from Sanne Group plc, a FTSE 250 alternative asset and corporate administration services provider, where he was Managing Director of its Corporate and Private Client segment and a key member of its Executive Committee.

Prior to that, he spent nearly 14 years in the Caribbean, Canada and Jersey with the wealth management arm of the Royal Bank of Canada (RBC), a leading multinational bank, where he rose through the ranks to take up the role of Global Head of UHNW Trust/Fiduciary and was a key member of its Global Trust Advisory Board overseeing the bank's global trust and fiduciary businesses. Prior to that, Steve was with Deloitte for over a decade focusing on cross-border wealth structuring in Canada and the USA.

**Serge Krancenblum (Executive Chairman, IQ-EQ and Chairman of the Luxembourg Association of Family Offices (LAFO))**





Know how Know you

Serge has turned the group he founded almost 30 years ago into IQ-EQ, a world leading investor services firm. Serge has brought together the rare combination of global expertise with a deep understanding of the needs our clients.

Serge studied his Masters in Finance at the ESLSA Business School in Paris and has an MBA from the University of Connecticut, School of Business. He is a native French speaker and fluent English speaker.

Throughout his career, Serge has developed and managed cross-border solutions for multinational corporations, institutional investors and entrepreneurial families. He also sits as an independent director on the boards of several real estate and private equity funds, as well as on those of selected listed and private companies.

**Justine Markovitz (Chairperson of Withers and is a partner of the private client and tax team)**



Justine focuses on advising private clients and financial institutions in relation to tax, trusts and estate planning. She also advises on wills and trust drafting matters as well as on international tax investigations. Justine became global chairperson of Withers Worldwide in July 2019.

Justine concentrates on advising families on succession and governance issues. She works with those families to create structures and other legal solutions to implement their long-term succession plans both for their personal assets and their business interests.

**Michael Zeuner, Managing Partner, WE Family Offices**





Michael Zeuner has been serving wealthy families for more than two decades. As one of three managing partners of WE Family Offices, he oversees the firm's US business strategy. Michael is a nationally recognized leader in the family office industry and has dedicated his professional career to empowering financially successful families to manage their wealth. In addition, Michael is a co-founder of the Institute for the Fiduciary Standard.

Prior to his role at WE Family Offices he served as senior executive partner of GenSpring Family Offices. In this capacity, he had responsibility for the leadership and management of GenSpring's network of 10 family offices in the United States, that firm's key advisory practices, and its delivery of a high-quality client experience. In addition, he was a member of the firm's Operating Committee. Before joining GenSpring, Michael was managing director and global head of Wealth Solutions at JP Morgan Private Bank. As a member of the executive team, he had responsibility for strategic planning, branding, marketing and specialized advisory services (family governance, philanthropy and fine art wealth management) for the worldwide private bank.

A management consultant by training, Michael led projects in the financial services area for both Andersen Consulting (now Accenture) and Booz, Allen & Hamilton. He joined Chase Manhattan in 1995 as vice president at the investment bank and moved to the private bank in 1997 to head up strategy and marketing worldwide. JP Morgan and Chase merged in January 2002.

Michael also serves as a mentor at the Watson Institute, which specializes in incubating social focused entrepreneurs and their businesses. Watson mentors are among the foremost leaders and practitioners in the area who work one-on-one with scholars to help them solve challenges and broaden their global network.

Michael graduated from Brandeis University, (B.A.) and earned an M.B.A. from the University of Chicago.