

GLOBAL-ASIA FAMILY OFFICE CIRCLE

GFO PARTNERS CIRCLE

Founded by GIC and Temasek, the Wealth Management Institute (WMI) is committed to building capabilities for investing in a better tomorrow. In partnership with the family office community and supported by the Singapore Economic Development Board and the Monetary Authority of Singapore, WMI has launched the **Global-Asia Family Office Circle (GFO Circle)** as the leading voice and umbrella association for family offices in Singapore and Asia.

The GFO Circle is a network platform for the family office community in Singapore and Asia, aimed at fostering peer learning, collaboration and community building.

MEMBERSHIP BENEFITS

The GFO Circle will convene a global-Asia community of family office principals, professionals and partners. The **GFO Partners Circle** will be a trusted environment for family office partners and advisors to come together, share knowledge and gain unparalleled access to cutting-edge insights from a wide range of global thought leaders from industry and academia. As a member, you will enjoy these benefits:



Advance Capabilities

- Innovative education programmes in family office leadership, management, investments and impact
- Rigorous certification mapped to in-demand skills
- Peer-to-peer learning with others in the sector



Community Building

- Roundtables and Insights Series with leading Family Office thought leaders
- Members-only, closed door events
- Preferential access and pricing to GFO Circle events including GFO Conference and Distinguished Leader Series Lectures
- [For Senior Members] Opportunity to be listed on the GFO Partners Directory



Thought Leadership

- Access latest research articles and publications on cutting-edge topics
- Practical tools and templates

MEMBERSHIP ELIGIBILITY

Membership will be subject to the below eligibility criteria, and an Annual Membership Fee will be applicable.

To encourage community and capability building, the Annual Membership Fee will be waived if the Member attends a minimum number of WMI Certification within the year, on a topic related to family offices or trusts. Members must nominate their selected programme(s) upon joining the GFO Circle.

SENIOR MEMBERSHIP

GFO Partners Senior Membership

Senior Membership is applicable to senior advisors to family offices in the private banking, asset management, MFO, trust services, legal, tax, accounting and IFA sectors. Senior Members will be expected to contribute to industry development and expertise sharing.

Senior Membership is by invitation only and subject to screening by our Membership Committee.

Annual Membership Fee of \$1,000 (inclusive of GST)

Fee Waiver applicable if Member attends or speaks at one WMI Certification Programme within the year, on a topic related to family offices or trusts

ASSOCIATE MEMBERSHIP

To encourage wider learning within the sector, applications for Associate Membership will be open to active industry practitioners who have successfully completed a certified training programme at WMI on a topic related to family offices or trusts.

GFO Partners Associate Membership

Associate Membership is applicable to advisors to family offices in the private banking, asset management, MFO, trust services, legal, tax, accounting and IFA sectors.

Has successfully completed one WMI Family Office Certification course (e.g. FO Advisor Foundation)

To comply with the GFO Circle Code of Conduct

Annual Membership Fee of \$500 (inclusive of GST)

Fee Waiver applicable if Member attends at least one WMI Certification within the year, on a topic related to family offices or trusts

CORPORATE MEMBERSHIP

Eligible firms are also invited to apply for Corporate Membership of the GFO Circle. Corporate Members will also be able to conduct special projects with WMI and the GFO Circle, for example in thought leadership. For more information, connect with us at gfocircle@wmi.edu.sg.

GFO Corporate Membership

Leading firm serving family offices, from the private banking, asset management, MFO, trust services, legal, tax, accounting and IFA sectors.

To nominate at least 2 Senior Members and 5 Associate Members from the firm (or equivalent)

To comply with the GFO Circle Code of Conduct

Corporate Members will be entitled to a 10% discount on the total Annual Fees of their nominated Senior Members and Associated Members

For Members who qualify for Fee Waiver, Annual Fee will be pro-rated accordingly

JOIN US AND BE PART OF OUR COMMUNITY

To join us as a Member, click the 'Apply Now' button below. We will get in touch with you shortly to assist you through the next steps of application.

For enquiries, please contact us at gfocircle@wmi.edu.sg.

**APPLY FOR
ASSOCIATE MEMBER**

**APPLY FOR
SENIOR MEMBER**