

## STEP Malta AGM & CPD Session

“Does it all need to be in-house? Family office evolution and the Malta answer:”

### SPEAKERS



Anna brings over a decade of experience in family offices and cross border wealth management, including leading a London based family office for a global family and working as a Wealth Advisor at HSBC Private Bank. She guided UHNW families on investment portfolios, managed multi jurisdictional wealth structures, and supported long term strategic planning. She established and ran family office operations, ensuring strong governance and cohesive coordination across all activities.



André Zerafa co-leads the firm’s Investment Services & Funds practice and previously served as managing partner. He advises asset managers and service providers on regulatory, corporate, and licensing matters, with a focus on alternative fund structuring and sustainable finance.

He has contributed to key Maltese legislative and regulatory initiatives and holds roles within MFSAC, IFSP, MASA, and EFAMA’s Tokenization Working Group. André also lectures at the University of Malta and is an ACAMS Certified Anti-Money Laundering Specialist.

**Date:** 24th June 2026

**Time:** 15:00

**Location:** Phoenicia Hotel - Valletta

### Agenda:

15:00 Registration and Coffee/Tea

15:15 Annual General Meeting

16:00 CPD Session - *Does it all need to be in-house? Family office evolution and the Malta answer:*

17:20 Q&A

17:30 Networking

18:00 End

Cost:

€40 – Non-members

**Kindly confirm your attendance by sending an e-mail to [info@stepmalta.com](mailto:info@stepmalta.com)**

**by close of business on 19th June 2026**