

Family Office Scheme Media Conference

6 October 2025

Presentation by Datin Paduka Azalina Adham, Managing Director, Securities Commission Malaysia



Family Office Scheme surpasses targets within a year

Diversify & deepen capital base in Malaysia

- Aimed at attracting management of family wealth which would **widen the investor pool as an alternative source to invest** in the various opportunities in particular the **various national agenda** – NIMP, NETR & JS SEZ.
- **Through mandatory local investments & expenditure, SFO scheme is expected to generate greater employment opportunities and positive effect to the greater economy.** FO establishments are also projected between 2025-2044 to bring a net gain of between RM 3.4 billion to RM 9.4 billion, which would raise the ceiling and position Malaysia as a competitive investment destination

50+

Consultations Held

Family reps
Family Advisors
Service providers (Big4, fund managers, lawyers)

30

Expression of interest received

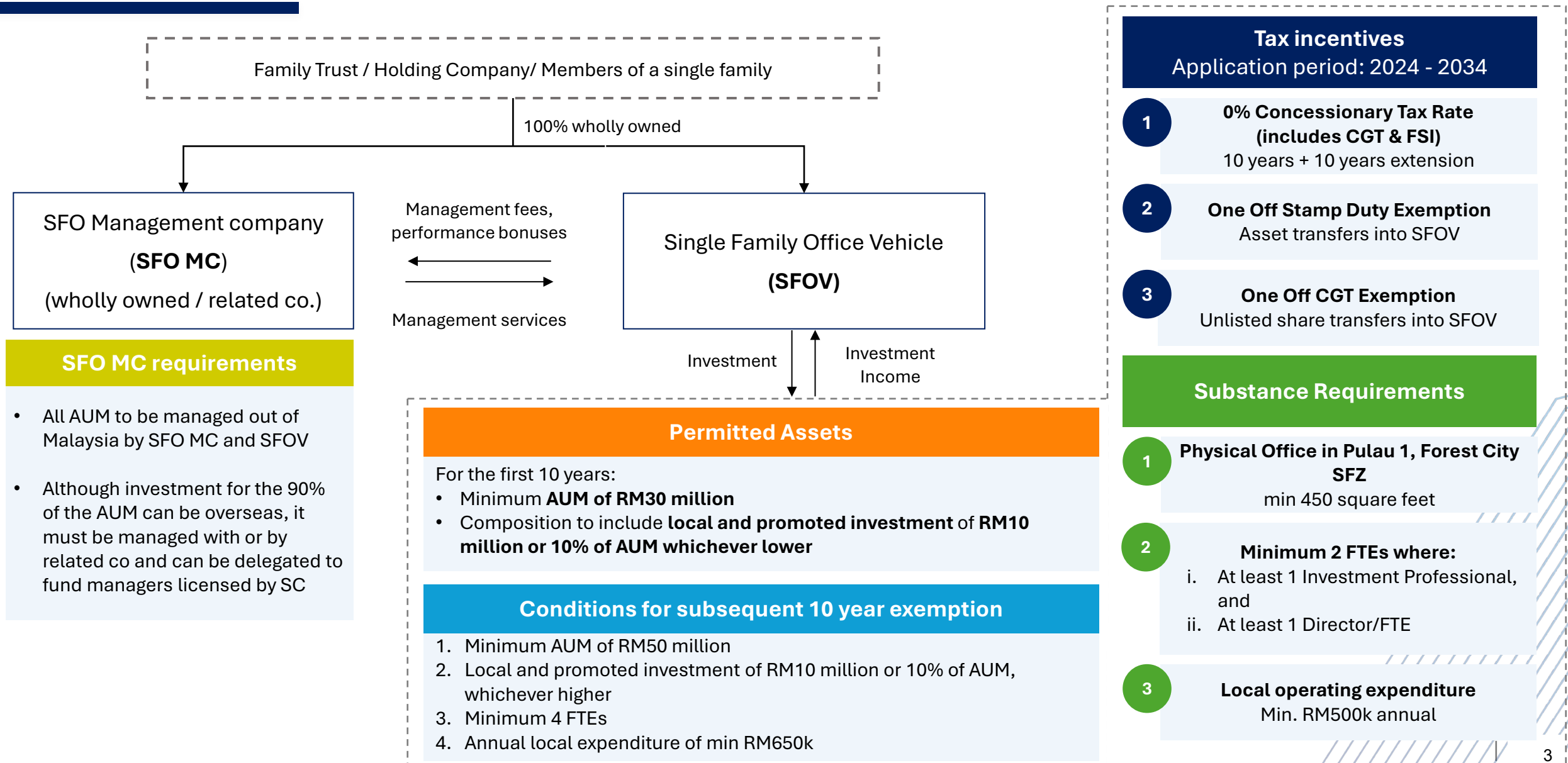
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Conditional Approvals Issued

**Indicative AUM from 6 Approvals
RM 400 mil.**

**End of Year AUM Target for 2026
RM 2.0 bil.**

Facilitative tax incentive scheme – gazetted on 3 Oct 2025



Managing global wealth from Malaysia

AUM of RM30 million, composition of the AUM can be invested in Malaysia or abroad

- | | |
|--|---|
| • Shares that are listed on any exchange | • Bank deposits in foreign or local currencies |
| • Bonds notes, commercial papers and treasury bills | • Forex instruments |
| • Islamic capital market products | • Future contracts |
| • Private companies in Malaysia (excluding SPV holding property only) | • Local and global collective Investment Scheme |
| • Real estate holdings limited to Forest City | • Global Venture Capital and Private Equity funds |
| • Derivatives that are listed/quoted on a stock exchange, or dealt in OTC market-structured products | • Portfolio management by SC licensed FM |

10% or RM10 million of the total AUM, whichever is lower, must comprise of local investments

Eligible Local Investments

1. Listed securities on Bursa Malaysia
2. Islamic capital market products in Malaysia
3. Ringgit-denominated debentures and Malaysia Government Securities (MGS)
4. Exchange traded derivatives on Bursa Malaysia Derivatives
5. Private Equity (PE) and Venture Capital (VC) funds by SC registered VC & PE managers
6. Portfolio management, where underlying is 70% in Malaysia, offered by SC licensed FMs
7. Shares of tech and SRI companies incorporated in Malaysia

Promoted Investments

These investments will count as 1.5x multiple towards the local AUM requirements

1. Sustainability funds, bonds and sukuk that align with Malaysia or ASEAN standards for underlying Malaysian projects
2. *Waqf* – featured framework funds
3. ECF & P2P campaigns on SC registered Recognised Market Operators (RMOs)
4. Shares of companies approved by MIDA under the JS-SEZ Tax Incentive Package.
5. Shares of companies that align with the NIMP prioritized sectors.

Conducive ecosystem with dedicated visa

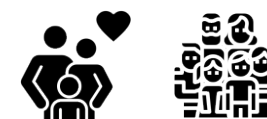
- **Fast Track – Resident Pass Talent (FT-RPT)** is the visa pathway under the SFO Scheme. This would **serve for both family members and full-time foreign professionals** working in the family office
- At minimum 3 FT-RPT can be shared between family members and expats working in family office and families may request more on a case-by-case basis

10 **+** **10**
years years

Residency of 10 years &
renewable for another 10
years



Grants rights to start a business, pursue
further study and employment in Malaysia,
with privileges extended for spouse and
children under 18



Dependents over 18 years old, parents
and parents-in-law are eligible for a
renewable one-year Social Visit Pass
for up to five years

Thank You