

# HERITAGE

AMANAH



*Our purpose is to build legacies by facilitating the preservation and growth of assets for our clients bridging borders, cultures and generations.*

*With Heritage Amanah as your Partner of Choice, your organisation can continue to push the boundaries, innovating and outpacing the competition - ensuring your investment is in the best possible hands.*

*Welcome to Heritage Amanah.*

*Salina Nordin*  
Founder & President Director





*As the Head of Private Financial Circle, it is my responsibility together with the team to hold the "amanah" (or trust) of our founder to develop our company into a world-class wealth advisory. Bringing financial elites and partners from Indonesia, Asean and Mena GCC countries together under our open architecture Privilege Lifestyle Financial Advisory platform, we offer tailor-made solutions to our members.*

*I believe that the key to becoming the preferred wealth advisory hub, our services should be based on trust and relationships.*

*Our highly regarded Private Financial Circle, connects Heritage Millennials entrepreneurs directly to our esteemed global network of experts that correlates to our group vision to handhold the younger generations as drivers of change. Through our philanthropic arm, Muda Giat Peduli Foundation, we aim to inspire our Millennials as our legacy.*

*With the support of a vastly experienced and dedicated team, we aim to be the "Oracle in Finance" and share more to society.*

*Tania Nordin*  
Head of Private Financial Circle





”

When minds meet, they don't just exchange facts: they transform them, reshape them, draw different implications from them, and engage in new trains of thought.

Conversations don't just reshuffle the cards: it creates new cards.

*Theodore Zeldin*

Author & Historian  
1933



We believe that the foundation of any relationship is **trust**. It is our **humility, integrity, diligence, accountability** and **spirit of collaboration** that are our guiding pillars.







We pride ourselves on our ability to recognise bold new ideas, reward innovation and creativity. We partner companies and entrepreneurs working in synchronicity, creating sustainable long-term relationships with a single minded focus on creating winning business results through best practice, innovation and our considerable knowledge of the financial industry markets.



**BOUTIQUE  
APPROACH**

.....

Aims to only offer its exclusive boutique services to limited partners from each country as an effort to maintain a distinct and highly personal approach.



**LOCAL EXPERT**

.....

Supported by strong on-the-ground team that has deep cultural understanding and access to resourceful information in the market.



**GLOBAL  
PRESENCE**

.....

Has established a global presence with professional network all around the world to source opportunities and expand industry expertise globally.



**INNOVATIVE  
THINKING**

.....

Has no standard approach and continuously aims to go beyond in order to deliver the best outcomes for each of our client's financial needs.



**EXPERIENCED  
PROFESSIONAL**

.....

Supported by strong team of dedicated and committed professionals who believe in building life-long partnership with the clients.



**ASIAN  
VALUES**

.....

Builds relationship centered around family values of trust, partnership, commitment, honesty and integrity.



## PARTNERING YOU FOR COMPREHENSIVE INVESTMENT SOLUTIONS

Our deep understanding of the Indonesian culture coupled with a broad knowledge of the Asian capital markets enables us to recognise and tap into promising opportunities for long-term value creation.

Our integrated business model combines the resources of our business divisions allowing us to provide comprehensive financial solutions for our clients, while our strong origination capability provides unique access to private deals within our network of trusted circles



Our private investment arm focuses on private investments, deal origination and execution, and product distribution.



### ASSET MANAGEMENT & SECURITIES COMPANY PARTNERS

Our fund management component offers investment products and is licensed by OJK

- Bahana Group
- Mandiri Manajemen Investasi
- Syailendra Capital
- Buana Sekuritas
- Sinarmas Asset Management
- Danareksa Manajemen Investasi
- Sinarmas Sekuritas

## HERITAGE AMANAH

An independent wealth advisory company that offers an open architecture services to high net worth individuals, multi-family offices, institutions and corporates licensed by the Financial Services Authority of Indonesia (OJK)

- Portfolio Advisor
- Financial Planning
- Property
- Insurance
- Lifestyle Travel
- Arts Advisory
- Hatch Wealth

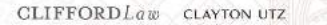
HERITAGE Millennials





## OUR NETWORK OF ESTABLISHED GLOBAL PARTNERS

When our clients chose us to be their Partner of Choice, they are in turn aligning themselves with a broad spectrum of commercial, corporate and personal services made up of some of the most highly regarded professional organizations in the world. We believe that this enables us to not only develop long-lasting relationships but to actively support our client in building world-class business.







## HERITAGE AMANAH AIMS TO GROW TOGETHER WITH OUR CLIENTS

We believe in earning the trust of our partners by maintaining integrity and honesty throughout our investment approach.

### RELATIONSHIPS ..... TRUST

Independent  
Investment  
Advisory

Deal Origination  
and Execution

Open Architecture  
Fund Platform

Digital Wealth  
Advisory Platform



#### Strong Financial Foothold

A combined track record of over 30 years of experience in the Indonesian Capital Market



#### Private Investment Across Sectors

Various investments across equity and debt with values reaching more than US\$300 million



#### Licensed by Indonesian Regulators

Obtained the Investment Advisory company by the Financial Services Authority (OJK)



#### Global Network and Local Experts

Established partners across Asia, MENA GCC and Europe



#### Established an Exclusive Private Financial Circle (PFC)

50 selected Millennials to benefit from a closed global network and mentorship programs



#### Open-Architecture Product Platform

Presenting the best products and asset classes independently to our clients



PARTNERSHIP  
HERITAGE AMANAH x BAHANA



Collaboration to lead the way to MENA GCC





# HERITAGE Millennials

*"...we need to do more to enable young people to "become drivers of change", to empower them to believe that the future really is theirs to influence and build."  
Sultan of Perak Sultan Nazrin Muizzuddin Shah at the 5th World Conference on Islamic Thought and Civilisation (WCIT) at Ipoh, Perak, July 2018.*



We see an opportunity, the invaluable sharing of life's experiences, business acumen and the network of trusted mentors that needs to be passed on to the next generation of exceptional youth and entrepreneurs.

The vision is to be intimate and closed circle across several emerging markets by demonstrating trust, integrity and discretion across generations, as well as cultures.

This resonates with the nature of millennials, who can provide new ideas, new thinking, new platforms, and are encouraged and thrive on mutual collaboration whether for a cause, entrepreneurship or for lifes' pursuits







**Heritage Amanah (and our affiliates) provides end-to-end financial solutions** tailored to the diverse needs of our clients. An independent private financial group, our strength lie in our independence from large business groups; our extensive capital market experience and our unquestionably integrity.

### SYAILENDRA CAPITAL

**Fund management** component offers investment products and is **licensed by OJK (Otoritas Jasa Keuangan)**

### SYAILENDRA ASIA

**Private Investment** arm focuses on private investments, deal origination and execution, and product distribution.

### HERITAGE AMANAH

**An independent wealth advisory company** that offers an open architecture services to high net worth individuals, multi-family offices, institutions and corporates **licensed by the Financial Services Authority of Indonesia (OJK)**



**AMG strives to introduce affordable healthcare ecosystem.** We focus on pharmaceutical, medical device, digital healthcare and medical community partnerships.



**Heritage Amanah Financial Technology**, a subsidiary of Heritage Amanah group that **provides an exclusive one stop digital advisory and product platform** consisting of both web-based and mobile phone based application for our Global clientele to **Accumulate, Preserve and celebrates lifestyle** through a tailored financial concierge services.



**Seeks to enhance flows of funding or to coordinate a sustainable fund flow on the millions for the underprivileged segment.** For the 1st campaign "Millennials Goes Pink" is an awareness of early detection of breast cancer.



**Yayasan Muda Giat Peduli Indonesia** was founded to support and guide the passion of our millennials nationwide in our Corporate Social Responsibility (CSR) to maximise the penetration of goodness acts for a better living and healthier impact through joint efforts.

Through the *Millennials Goes Pink* campaign, our initiatives is to **complement** Indonesia based Cancer foundation to help **increase the awareness of early detection of Breast Cancer** and coordinate a **sustainable funding flow**.

THROUGH THIS CAMPAIGN,  
*Millennials Goes Pink*

AIM TO TOUCH 10 MILLION LIVES IN THE YEAR 2019

While embarking on these ambitious early detection awareness through online and offline education nationwide, **Yayasan Muda Giat Peduli Indonesia** seeks to enhance flows of funding on the millions for the underprivileged segment.

**Yayasan Muda Giat Peduli Indonesia** is encouraging and inviting millennials across Indonesia to join force and strengthened the echoes of our voices to support this invaluable campaign to have a stronger empowerment to health and better life throughout the nation with early detection awareness.

In the year 2018, **Yayasan Muda Giat Peduli Indonesia** together with **Yayasan Kanker Payudara Indonesia (YKPI)** and **Komunitas Srikandi** organized a Free Mammogram Roadshow. The Mammogram Roadshow is a free mammogram examination program given to 50 underprivileged women aged 40 (forty) and above. *Millennials Goes Pink* has done 200 free Mammography, and has shared **SADARI (Periksa Payudara Sendiri)** education to 500 people.

In 2019 *Millennials Goes Pink* targets to reach out 10 million lives throughout Indonesia.





## Erry Firmansyah

*President Commissioner*

He is one of the most important figures in the Indonesian capital market industry. Prior to becoming President Director of the Indonesian Stock Exchange (IDX), Erry served as President Director of the Indonesian Central Securities Depository (KSEI) from 1998 to 2002. He later moved to IDX until July 2009, before establishing PT Eagle Capital in October 2009. Erry also currently serves as an Independent Commissioner for numerous companies including PT Astra International and PT Pefindo. He has also served as President Commissioner of KSEI since 2009.

## Salina Nordin

*President Director*

She has 28 years of experience in the Indonesian financial industry including 18 years in equity sales and wealth management and 7 years in foreign private banking. Salina was a Financial Controller with aviation finance consultant Petraguna Persada before beginning her career in the capital markets with Lippo Securities as an institutional equity sales executive. She later joined Danareksa, Indonesia's leading investment banking firm where she became Deputy Head of Equity Capital Markets and was named Head of Wealth Management Division in 2003. In 2006, she moved to Credit Suisse as Business Development Director and in 2007 joined Julius Baer Advisors Indonesia as the President Director. In 2012, she launched Syailendra Asia linking with Syailendra Capital under the umbrella of Syailendra Group. Salina founded Heritage Amanah in 2015, the first wealth advisory company in Indonesia which was awarded an Independent Advisory license by Indonesia's Financial Services Authority (OJK). She obtained Chartered Financial Consultant (ChFC), Chartered Life Underwriter (CLU) and Certified Financial Planner (CFP) in 2002-2003 from Singapore School of Insurance. In 2007, obtained the Investment Manager Representative license (WMI) and Broker Dealers Representative license (WPPE) from the Capital Market Supervisory Agency and Financial Institution of the Republic of Indonesia.







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