

SEMINAR ON

OTHER DEVELOPING LEGAL ISSUES FOR TRUSTEES

- Speaker : Ms Joanna Caen, Partner, Private Wealth Team, Herbert Smith Freehills
- Date : Wednesday 26 June 2019
- Time : 5:30 p.m. – 6:30 p.m.
- Venue : Herbert Smith Freehills, 23rd Floor, Gloucester Tower, 15 Queen's Road Central, Hong Kong
- CPD : One Point for HKTA Certified Trust Practitioner TM

The speaker:

Ms Joanna Caen is a Partner in the private wealth team at Herbert Smith Freehills, or is in fact their Head of Private Wealth – China. Joanna is admitted as a solicitor of the High Court of Hong Kong and as a barrister and solicitor of the High Court of New Zealand. Joanna has spent her entire career in the private wealth space. She advises clients from across the private wealth sphere (including individuals, private banks, trustee companies and other fiduciaries and advisers) on various private wealth issues. Her particular specialisms are trusts, estates, family companies, charities and, increasingly, mental capacity issues. She provides both non-contentious and contentious advice.

The talk will cover:

- a. Looking at Anti-Bartlett clauses and oversight of the investment adviser / management of a PTC in light of the Wise Lords decision –
 - (i) A brief review of what Anti-Bartlett clauses seek to do;
 - (ii) Summary of the Wise Lord decision and its implications; and
 - (iii) What trustees should consider in light of the Wise Lords decision – express provisions to protect under the trust deed?

- b. Data protection / data privacy including GDPR and managing sharing of beneficiary data with third parties such as private banks –
 - (i) Aspects of trustees' data retention policy for banks; and
 - (ii) Use of data of trust clients by private bank.



香港信託人公會
Hong Kong Trustees' Association

SEMINAR ENROLLMENT FORM

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Seminar Fee : HK\$400 (member); HK\$450 (non-member)
CPD points : One for HKTA Certified Trust Practitioner™

Name of Company _____

Name(s) of attendee(s) _____

Contact Person: _____ Phone: _____

Email: _____ (for sending out confirmation)

Payment (please tick as appropriate)

HK\$400 (member) x _____ Person = HK\$ _____

HK\$450 (non-member) x _____ Person = HK\$ _____

Payment method (please tick as appropriate)

Cheque payment [made payable to “**HK TRUSTEES’ ASSOCIATION LTD**” is attached and send to **HKTA Room 1103, 11/F., V Heun Building, 138 Queen’s Road Central, HK**

By bank transfer [**Standard Chartered Bank A/C No.: 447-0-024582-3**]. Please email the bank receipt (put indicate your full name on it) to **irislau@hktrustees.com**

e-Receipt will be issued to company unless otherwise stated: _____

e-Attendance certificate (please tick as appropriate)

Yes [participants must sign in and out at the seminar]

No

Note:

1. Post-dated cheque will NOT be accepted.
2. Payment are non-refundable unless the event is cancelled by the Association.
3. Seat reservation is on first-come first-served basis with payment.
4. e-Attendance certificate will be issued within 10 working days after the completion of the seminar.