

Hong Kong Trustees' Association  
 Candidates for Election/Re-election to the 2023 Executive Committee

Existing Executive Committee:

1.

<b>Name</b>	<b>Ka Shi Lau</b>
<b>Job Title and Company</b> (for corporate member)	Senior Advisor, BCT Group (BCT Financial Ltd. & Bank Consortium Trust Co. Ltd.)
<b>Areas of experience/profession/contribution to work of HKTA</b>	Pension, Funds and Corporate Trust
<b>Years of serving at the Executive Committee</b>	Since 2003
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	Chairman Co-Chairman, Pensions and Funds sub-committee
Remarks	Ka Shi has been - representing the MPF trustees/sponsors , fund trustees and custodian groups on initiatives relating to pensions and funds; and - working closely with government officials, regulators, professional bodies, market players and academia for exchanging knowledge and addressing issues of interest related to retirement protection and fiduciary services

2.

<b>Name</b>	<b>Michael Raymond Shue</b>
<b>Job Title and Company</b> (for corporate member)	Managing Director, Tricor Services Limited
<b>Areas of experience/profession/contribution to work of HKTA</b>	Trusts and family succession planning
<b>Years of serving at the Executive Committee</b>	Since 2009
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	Vice Chairman Co-Chairman, China Development sub-committee
Remarks	Standing for re-election on Executive Committee as representative of Tricor Services Limited

3.

<b>Name</b>	<b>Gidget Chan</b>
<b>Job Title and Company</b> (for corporate member)	Head of Risk, Compliance & Legal Department, BOCI-Prudential Trustee Limited
<b>Areas of experience/profession/contribution to work of HKTA</b>	Pensions and Funds Experienced in risk, trust and fiduciary areas of investment funds / pension schemes.
<b>Years of serving at the Executive Committee</b>	Since 2022
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	Hon Treasurer
Remarks	

4.

<b>Name</b>	<b>Stefano Mariani</b>
<b>Job Title and Company</b> (for corporate member)	Partner, Deacons
<b>Areas of experience/profession/contribution to work of HKTA</b>	Tax, trusts, teaching the TTC course and reviewing its materials, providing guidance to the Executive Committee on legal and professional training matters
<b>Years of serving at the Executive Committee</b>	Since 2015
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	Hon Secretary
Remarks	

5.

<b>Name</b>	<b>Carolyn Butler</b>
<b>Job Title and Company</b> (for corporate member)	Managing Director, International Fiduciaries Limited
<b>Areas of experience/profession/contribution to work of HKTA</b>	Experienced in private & corporate trusts, funds, pension schemes, trustee & fiduciary services. Responsible for delivery of HKTA Trust Training Course and co-ordinating its current revamp
<b>Years of serving at the Executive Committee</b>	Since 2003
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	Chairman, Education sub-committee
Remarks	

6.

<b>Name</b>	<b>Lucia Kit Chu Chan</b>
<b>Job Title and Company</b> (for corporate member)	ASP Lead, Senior Product Manager, Global Trustee and Fiduciary Services, HSBC Institutional Trust Services (Asia) Limited
<b>Areas of experience/profession/contribution to work of HKTA</b>	SME in Fund Industry, leading trustee and fiduciary products in the ASP region. I am a practising lawyer in HK.
<b>Years of serving at the Executive Committee</b>	Since 2022
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	
Remarks	Delivery of Trust Training revision class for HKTA TTC Part B (Stream 2) Exam in Nov 2022 ; Acted as panel speakers for a webinar jointly held by HKTA and KPMG in Sept 2022

7.

<b>Name</b>	<b>Fan Choi</b>
<b>Job Title and Company</b> (for corporate member)	Managing Director, Union Bancaire Privee, UBP SA, Hong Kong Branch
<b>Areas of experience/profession/contribution to work of HKTA</b>	Wealth planning for HNWIs involving trusts and other fiduciary structures.
<b>Years of serving at the Executive Committee</b>	Since 2015
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	Chairman, Best Practices sub-committee Co-Chairman, Professional Development and Training sub-committee.
Remarks	

8.

<b>Name</b>	<b>Paula Choi</b>
<b>Job Title and Company</b> (for corporate member)	Chief Operation Officer, Principal Trust Company Asia Limited
<b>Areas of experience/profession/contribution to work of HKTA</b>	Pensions and Funds
<b>Years of serving at the Executive Committee</b>	Since 2022
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	
Remarks	

9.

<b>Name</b>	<b>Chow Yu Rebecca</b>
<b>Job Title and Company</b> (for corporate member)	Retiree <i>(standing for re-election under individual member)</i>
<b>Areas of experience/profession/contribution to work of HKTA</b>	Former chairperson of Professional Development and Training Sub-Committee
<b>Years of serving at the Executive Committee</b>	Since 2013
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	
Remarks	Former Managing Director of Trident Trust Hong Kong specialises in private trust and corporate service advisory.

10.

<b>Name</b>	<b>Lam Kin Chuen Wilson</b>
<b>Job Title and Company</b> (for corporate member)	Pension Strategy, Director, Corporate Solutions AIA International Limited
<b>Areas of experience/profession/contribution to work of HKTA</b>	Pensions and Funds
<b>Years of serving at the Executive Committee</b>	Since 2019
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	
Remarks	

11.

<b>Name</b>	<b>Gabriel Cheung</b>
<b>Job Title and Company</b> (for corporate member)	Head of Quality Assurance, BestServe Financial Limited <i>(standing for re-election under individual member)</i>
<b>Areas of experience/profession/contribution to work of HKTA</b>	Corporate trust, funds and pension
<b>Years of serving at the Executive Committee</b>	Since 2018
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	Co-Chairman, Professional Development and Training sub-committee
Remarks	Gabriel had led the Hong Kong Trustee and Fiduciary Services team at HSBC, and served as Head of Trustee Services at Brown Brothers Harriman as well as Head of Trustee, Hong Kong at BNY Mellon.

12.

<b>Name</b>	<b>Ma Yuk Sheung Loretta</b>
<b>Job Title and Company</b> (for corporate member)	Consultant <i>(standing for re-election under individual member)</i>
<b>Areas of experience/profession/contribution to work of HKTA</b>	Corporate trust, funds and pension
<b>Years of serving at the Executive Committee</b>	Since 2007
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	Co-Chairman, Pensions and Funds sub-committee
Remarks	Loretta had served in the roles of Head of Client Management at HSBC Trustee and Head of Trust at State Street Trustee before she retired in June 2015.

## New Candidates for Election:

13.

<b>Name</b>	<b>John M Ashwood</b>
<b>Job Title and Company</b> (for corporate member)	Managing Director, ZEDRA Asia Limited
<b>Areas of experience/profession/contribution to work of HKTA</b>	Over 25 years of extensive experience in helping clients with their Trust, Tax and Structuring needs. Chartered Accountant, a Chartered Tax Advisor, and a long-standing member of many professional institutions, including STEP, HKTA and the International Tax Planning Association (ITPA).
<b>Years of serving at the Executive Committee</b>	N/A
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	N/A
Remarks	<a href="#">Attached bio</a>

14.

<b>Name</b>	<b>Cheng Lai Ching Christy</b>
<b>Job Title and Company</b> (for corporate member)	Head of CCBA Trustee, CCB (Asia) Trustee Company Limited
<b>Areas of experience/profession/contribution to work of HKTA</b>	<p>The trustee experiences cover MPF schemes; APIF; SFC authorized funds including ETF and public OFC; private funds including private OFC, SPAC, etc. and that support end to end processes from corporate management &amp; governance, business development, clients management, compliance analysis &amp; documents review; oversight of service providers (including custody &amp; fund services) and operational processes; projects &amp; systems management; staffing and talents development, etc.</p> <p>With the foregoing, this facilitates supporting HKTA to conduct regulatory communication (and lobby); share experience for maintaining the best industry standards &amp; approach; attract talents, etc.</p>
<b>Years of serving at the Executive Committee</b>	N/A
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	N/A
Remarks	<a href="#">Attached bio</a>

15.

<b>Name</b>	<b>Penny Leung</b>
<b>Job Title and Company</b> (for corporate member)	Head of Trustee, BNY Mellon Trustee Company (Hong Kong) Limited
<b>Areas of experience/profession/contribution to work of HKTA</b>	Over 20 years of experience in trustee area of pensions and funds. Contribute to HKTA by acting as trainer and course developer for the Trust Training Certificate Course. Currently, acting as trainer and courser developer for the pension stream. Assist HKTA to hold industry events in order to promote the status of Hong Kong trust.
<b>Years of serving at the Executive Committee</b>	N/A
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	N/A
Remarks	<a href="#">Attached bio</a>

16.

<b>Name</b>	<b>Zau Ai Wei Audrey</b>
<b>Job Title and Company</b> (for corporate member)	Managing Director, Lombard Odier (Hong Kong) Ltd <i>(standing for election under individual member)</i>
<b>Areas of experience/profession/contribution to work of HKTA</b>	Experienced private wealth professional with a demonstrated history of providing wealth management and wealth planning solutions to high net worth clients in Hong Kong and the rest of Asia. Currently a managing director at Lombard Odier (Hong Kong) Limited, which belongs to the Lombard Odier Group, a private bank since 1796, the oldest private bank in Geneva. At the moment, I am serving on the STEP/HKTA joint China Sub-Committee. I would appreciate an opportunity to apply my experience in private client work and industry network towards contributing to HKTA.
<b>Years of serving at the Executive Committee</b>	N/A
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	N/A
Remarks	<a href="#">Attached bio.</a> Audrey has satisfactorily completed 12 months as a member of the China Development Subcommittee in 2022. (49A of the HKTA Articles of Association refers)