



香港信託人公會  
Hong Kong Trustees' Association

# 2023 HKTA CONFERENCE

## “TRUST Hong Kong”



16 November 2023 (Thursday)



2:30pm – 6:00pm



HKUST Business School Centre  
1501-02 Hong Kong Club Building  
3A Chater Road, Central, Hong Kong

Please scan for  
more details



**3.5**

CPD Hours

\* The “Certified Trust Practitioner™” & “Trust Training Course”  
Certificate Presentation Ceremony and Cocktail Reception will be  
held at 6:30pm-8:30pm at Hong Kong Club, following the Conference.

for HKTA Certified Trust Practitioner™  
and Law Society being applied for



# 2023 HONG KONG TRUSTEES' ASSOCIATION CONFERENCE

## “TRUST Hong Kong”

**Date:** 16 November 2023 (Thursday)  
**Time:** 2:30pm – 6:00pm (2:00pm Registration)  
**Venue:** HKUST Business School Centre, 1501-02 Hong Kong Club Building  
3A Chater Road, Central, Hong Kong

### Guest of Honour

**Mr. Christopher Hui, GBS, JP**  
Secretary of Financial Services & Treasury

### Introduction

The Hong Kong Trustees' Association is proud to present our first in-person conference and cocktail since the reopening of Hong Kong after the Pandemic with the title “Trust Hong Kong”.

Although travelling to and from Hong Kong was limited in the last few years due to the Pandemic lockdown, Hong Kong continues to be an important international financial centre for businesses and individuals worldwide, with the usage of trusts being an integral part of business structuring, investment funds and private wealth succession planning.

The conference will focus on why Hong Kong is still being trusted by the international community, with Mr. Christopher Hui, GBS, JP, Secretary for Financial Services & Treasury, Hong Kong SAR Government, giving the keynote speech and a fireside chat with the Honourable Geoffrey Ma, GBM, the former Chief Justice of the Hong Kong Court of Final Appeal for his views on the legal framework in supporting Hong Kong businesses.

There will be a regulator panel discussion focusing on the expectation on trustees given the recent introduction of various regulatory requirements required of trustees by the Hong Kong Monetary Authority, the Securities and Futures Commission and the Mandatory Provident Fund Schemes Authority which have regulated trustees for over 20 years. Further, with the increasing importance of Hong Kong being a “go to” jurisdiction for Family Offices, this conference will bring together all the elite of Hong Kong to exchange their insights.

A cocktail reception, and TTC and CTP certificate presentation ceremony will follow at 6:30pm-8:30pm to conclude the day. We are honoured to have Mr Lawrence Li, Chairman, Financial Services Development Council, to preside over the ceremony.

We look forward to your attendance.

## Conference Program

2:00pm – 2:30pm	<b>Registration</b>
2:30pm – 2:40pm	<b>Welcome Remarks</b> Ms. Ka Shi Lau, BBS <i>Chairman, Hong Kong Trustees' Association</i>
2:40pm – 3:00pm	<b>Keynote Address</b> Mr. Christopher Hui, GBS, JP <i>Secretary of Financial Services &amp; Treasury</i>
3:00pm – 3:45pm	<b>Session 1: Regulator Panel Discussion - Expectation on Trustee &amp; Depository</b>  <b>Panelists:</b> Ms. Christina Choi <i>Executive Director (Investment Products), Securities and Futures Commission</i>  Mr. Alan Au <i>Executive Director (Banking Conduct), Hong Kong Monetary Authority</i>  Mr. Eric Cheng <i>Executive Director (Policy), Mandatory Provident Fund Schemes Authority</i>  <b>Moderator:</b> Ms. Cynthia Chung <i>Partner, Head of Human Resources &amp; Pensions and Head of Corporate Commercial, Deacons</i>
3:45pm – 4:15pm	<b>Networking Time</b>
4:15pm – 4:45pm	<b>Session 2: Chairman's Fireside Chat with The Honourable Geoffrey Ma, GBM</b>
4:45pm – 4:55pm	<b>Session 3: InvestHK Family Office update on HK Family Office initiatives</b>
4:55pm – 5:40pm	<b>Session 4: Panel Discussion - The Role of Hong Kong Trustees in Family Offices</b>  <b>Panelists:</b> Dr. King-lun Au, MH <i>Executive Director, Board Member, Financial Services Development Council</i>  Ms. Deirdre Fu <i>Partner, Wealth Planning and Tax, Withers</i>  Ms. Liza Pang <i>Executive Director, Trust Services, Zedra</i>  Mr. Alvin Yap <i>Group Managing Director and Principal Consultant, AD Asian Multi Family</i>  <b>Moderator:</b> Mr. Michael Shue <i>Vice Chairman, Hong Kong Trustees' Association</i>
5:40pm – 5:50pm	<b>Session 5: HKTA Accreditation Program</b> Ms. Carolyn Butler <i>Chairman of Education Subcommittee, Hong Kong Trustees' Association</i>
5:50pm – 6:00pm	<b>Closing Remarks</b> Mr. Michael Shue <i>Vice Chairman, Hong Kong Trustees' Association</i>

## “CERTIFIED TRUST PRACTITIONER™” & “TRUST TRAINING COURSE” CERTIFICATE PRESENTATION CEREMONY AND COCKTAIL RECEPTION

**Date:** 16 November 2023  
**Time:** 6:30pm – 8:30pm (6:00pm Registration)  
**Venue:** The Hong Kong Club, Garden Lounge  
1 Jackson Road, Central, Hong Kong

### Presentation Ceremony and Cocktail Reception Rundown

6:00pm – 6:30pm	<b>Registration</b>
6:30pm – 6:35pm	<b>Welcoming Remarks</b> Ms. Ka Shi Lau, BBS <i>Chairman, Hong Kong Trustees' Association</i>
6:35pm – 6:45pm	<b>Speech by Guest of Honor</b> Mr. Laurence Li <i>Chairman, Financial Services Development Council</i>
6:45pm – 7:00pm	<b>Presentation of CTP and TTC Certificates</b> Mr. Laurence Li Ms. Ka Shi Lau, BBS
7:00pm – 7:15pm	<b>Presentation of TTC Certificates</b> Mr. Colin Shaftesley <i>Chairman, Hong Kong Securities and Investment Institute</i>
7:15pm – 7:20pm	<b>Closing Remarks</b> Mr. Michael Shue <i>Vice Chairman, Hong Kong Trustees' Association</i>
7:20pm – 8:30pm	<b>Cocktail continues</b>

## Enrolment Form

**Date:** 16 November 2023 (Thursday) **CPD credit:** 3.5 CPD Hours for HKTA Certified Trust Practitioner™ and Law Society being applied for

**Time:** 2:30pm – 6:00pm (2:00pm Registration) **Language:** English

**Venue:** HKUST Business School Centre, 1501-02 Hong Kong Club Building, 3A Chater Road, Central, Hong Kong

**Name of Company:** \_\_\_\_\_

**Name(s) of Attendee(s):** \_\_\_\_\_

**Email of Attendee(s):** \_\_\_\_\_

(Please provide email address of each attendee for sending confirmation and attendance certificate)

**Contact Person:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Email:** \_\_\_\_\_ **Mobile:** \_\_\_\_\_

**Registration Fee** (please tick as appropriate):

**a. HKTA Members** (  Corporate member /  Individual member)

Early-bird rate offered until 10 October 2023 at **HK\$980** Conference + Cocktail x \_\_\_\_\_ Person = HK\$ \_\_\_\_\_

Regular rate at **HK\$1,180** Conference + Cocktail x \_\_\_\_\_ Person = HK\$ \_\_\_\_\_

Please tick if you are attending the conference only

**b. Members of supporting organisations**

**HK\$1,180** Conference + Cocktail x \_\_\_\_\_ Person = HK\$ \_\_\_\_\_

Please tick if you are attending the conference only

please specify your organisation: \_\_\_\_\_

**c. Non-members**

**HK\$1,380** Conference + Cocktail x \_\_\_\_\_ Person = HK\$ \_\_\_\_\_

Please tick if you are attending the conference only

**Payment method** (please tick as appropriate):

Cheque payment (payable to "HK TRUSTEES' ASSOCIATION LTD") is attached and please send to **HKTA, Room 739, 7/F, Grand Millennium Plaza, 181 Queen's Road Central, HK**

By bank transfer (**Standard Chartered Bank A/C No. 447-0-024582-3**). Please email the bank receipt (indicate attendee's full name and conference date on it) to [carmenwong@hktrustees.com](mailto:carmenwong@hktrustees.com)

e-Receipt will be issued in favour of company name unless otherwise stated: \_\_\_\_\_

**Do you require an attendance certificate?** (please tick as appropriate)

Yes (Attendees must provide the same full name and sign in at the conference)

HKTA CTP no. (if applicable): \_\_\_\_\_

No

**Future Communication**

I agree to receive correspondence from the HKTA about its upcoming seminars, training courses, conferences and related activities. (Your data will not be used for other purposes and is held under strict controls in accordance with the Hong Kong Data Privacy Ordinance.)

**Important notes:**

1. Enrolments are accepted on a first-come-first-served basis.
2. HKTA members must complete the enrolment form and make payment by 10<sup>th</sup> October 2023 to enjoy the early bird discount rate.
3. Post-dated cheque will NOT be accepted.
4. Payment is non-refundable unless the event is cancelled by the Association.
5. Enrolled participants will receive an e-mail confirmation at least 5 working days before the Conference. Unsuccessful applicants will also be notified around the same time. If you have not heard from the Institute regarding your registration 5 days before the Conference or if you have any other enquiries related to the Conference, please contact the HKTA Secretariat at 3511 6030 or [queries@hktrustees.com](mailto:queries@hktrustees.com)
6. The e-Attendance certificate will be issued within 14 working days after the Conference.
7. In order to be eligible to HKTA CPD hours, participants are required to attend the entire Conference from 2:30pm to 6:00pm.
8. No CPD point will be granted if the attendee is late or depart 30 minutes before the end of the Conference.
9. If a black rainstorm warning or typhoon no. 8 is hoisted, the Conference may be cancelled or postponed. Please refer to the Institute's announcement on its website on the day of the Conference.