

**Organizers:**



# HKTA & STEP Joint Seminar: Hong Kong as a Family Office Hub – The Road Ahead



**3 September 2024 (Tue)**



**4pm – 6pm**

**(4pm–5pm presentation, 5pm–6pm networking)**



**1501-02, Hong Kong Club Building, 3A Chater Road, Central**



**English**

**1 HKTA CPD point**

**RSVP**

**RSVP to join the free seminar**



**Limited seats available  
on a first-come first-  
served basis**

**Register Now!**



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## **Keynote Speaker:**

**Mr. Jason Fong, Global Head, Family Office, Invest Hong Kong**

With the topic of "Hong Kong – The Global Family Office Hub," this keynote session will focus on the latest developments in family office, including government initiatives for establishing family offices and the new Capital Investment Entrant Scheme (CIES), along with future insights into the industry.

## **Panel Discussion**

**Moderator: Mr. Michael Shue, Vice Chairman, HKTA**

**Panel speakers:**

- **Mr. Jason Fong, Global Head, Family Office, Invest Hong Kong**
- **Mr. Clifford Ng, Co-Managing partner, Zhong Lun Law Firm LLP**
- **Ms. Nisha Singh, Consultant and Founder, Private Wealth Stewardship Ltd**
- **Mr. Alvin Yap, Principal Consultant and Group Managing Director, A.D. Financial Sdn Bhd**

## **The Panel will cover:**

- The challenges and successes that Hong Kong's Single Family Office Tax Exemption regime has encountered so far;
- What a full, comprehensive Family Office consists of (apart from just asset management)?
- An inhouse counsel's experience within a Family Office and experience under Singapore's Family Office regime;
- How Family Offices that do not fit within Hong Kong's Single Family Office Tax Exemption regime can also be attracted to Hong Kong?
- How can the Hong Kong Family Office regime help grow the local professional services industry beyond just the asset management industry?
- How can the Hong Kong Family Office regime help rebuild business confidence and the local economy in HK?

**\*\* Special thanks to FamilyOfficeHK, Invest Hong Kong for their support**

## Speakers

- **Mr. Jason Fong, Global Head, Family Office, Invest Hong Kong**

Mr. Jason Fong was appointed as the Global Head of FamilyOfficeHK, Invest Hong Kong ("InvestHK") in April 2023. InvestHK is the department of the Hong Kong SAR Government, and FamilyOfficeHK at InvestHK is responsible for promoting Hong Kong as the international hub and preferred choice of family offices.

Mr. Fong is a veteran in the banking and asset management industry with over 27 years of experiences before joining FamilyOfficeHK. He has held various senior positions with international financial institutions over his career and he has wide exposure in the Asia Pacific region including Mainland China, Hong Kong, Taiwan China, Singapore, Malaysia, Philippines, Japan and Korea. Mr. Fong was re-located to China and based in Beijing, Shanghai and Shenzhen, during his terms with international banks to take up onshore leadership.

Mr. Fong spent his early years in United Kingdom and graduated from the University of Leeds. He is an expert in family business and family office. He served as a senior consultant to banking associations and government advisory bodies. Mr. Fong is also the member of HKTDC Financial Services Advisory Committee and Steering Committee member of Asian Financial Forum.

- **Mr. Clifford Ng, Co-Managing partner, Zhong Lun Law Firm LLP**

Clifford is a Co-Managing Partner of Zhong Lun Law Firm's Hong Kong office and heads the Private Client practice. Having worked with some of Asia's leading businesses and families for over 30 years, Clifford provides strategic and innovative solutions on complex cross-border issues in multi-jurisdiction transactions, asset protection investment strategies, trust & estate planning & litigation, securities regulatory issues, business and family succession and creditor claims.

Clifford's team has been ranked in Band 1 by Chambers and recognised as Leading Firm by Legal 500 for Private Client / Tax and Trusts since 2018. Clifford has also been ranked in Band 1 for Private Client by Chambers continuously since 2012 and consistently in Citywealth Leaders List, Who's Who Legal, Legal 500 and Private Client Global Elite. He was recently awarded "Leading Individual (Advisor)-Pan Asia" at WealthBriefingAsia Awards as well as "Advisor of the Year - Succession Planning/Trusts" by Citywealth IFC Awards.

- **Mr. Michael Shue, Vice Chairman, HKTA**

Michael is a lawyer who has practised for more than 30 years. A large part of Michael's legal practice involved corporate and trust structures, assisting clients with asset protection, estate and family succession and tax planning, wills, probate, and estate and trust administration.

He holds a New Zealand law degree, is currently Managing Director of Vistra Group, Vice Chairman (and formerly Chairman) of the Hong Kong Trustees' Association ("HKTA"), and is Co-Chairman of the China Development Sub-Committee of the HKTA jointly with STEP Hong Kong.

## Speakers

- **Ms. Nisha Singh, Consultant and Founder, Private Wealth Stewardship Ltd**

Nisha is the founder of Private Wealth Stewardship (PWS), a boutique consultancy firm providing specialist independent advice to family businesses, family offices and other professional firms. Nisha is an international private wealth advisor and has been advising family offices and family businesses for 20 years, most recently as Head of Legal for the family office of a family and conglomerate headquartered in Singapore with more than 60,000 employees worldwide. Nisha advises on a range of matters helping families to grow, protect and pass on their wealth including international trusts, cross border succession planning, family governance, philanthropy advisory, investment management, dispute management, reputation management, family matters and establishing and operating family offices. Prior to joining the family office she held leadership positions at HSBC, serving at Global General Counsel for Trust & Fiduciary Services and Deputy General Counsel Asia for HSBC Private Banking Prior to that, she was Head of Private Wealth, Asia for a tier 1 London law firm.

Nisha is a Cambridge University graduate, where she achieved a First Class Honours in Law. She started her career in London in 2004. In 2013 she relocated to Singapore and moved to HK in 2018.

- **Mr. Alvin Yap, Principal Consultant and Group Managing Director, A.D. Financial Sdn Bhd**

Alvin Yap is the Principal Consultant and Group Managing Director of A.D. Financial Sdn Bhd ("ADF"). Under his leadership, ADF has expanded its footprint in Asia by establishing offices in Singapore and Hong Kong to provide consultancy for high net worth clients from Singapore, Indonesia, Vietnam, China and other countries. Besides that, he is highly sought after to speak in regional and international family wealth planning seminars. His expertise in Business Succession Planning has led many business owners and founders of listed companies to seek his advice on their complex business continuation and personal wealth matters.

Alvin is currently devoting his Practice to Multi Family Office Advisory for high net worth Individuals in structuring their complex wealth matters with a view to preserve their hard earned wealth. A strong believer of "Preservation First, Accumulation Second" and "Distribution Last", Alvin's expertise injects a fresh perspective on how wealth and family values can be preserved for many generations in Asian families.

### Note:

1. Seats are limited. Enrolments are accepted on a first-come-first-served basis.
2. Successful enrolled participants will receive an e-mail confirmation at least 2 working days before the seminar. Unsuccessful applicants will also be notified around the same time. If you have not heard from us, please contact the HKTA Secretariat at 3511 6030 or [queries@hktrustees.com](mailto:queries@hktrustees.com).
3. Seminar recording is not available.
4. The e-Attendance certificate will be issued within 10 working days after the seminar.
5. Attendees must provide and sign in the seminar with the same full name provided in this enrolment form.
6. No CPD point will be granted if the attendee is late or early departure for 10 minutes for the seminar.
7. If a black rainstorm warning or typhoon no. 8 is hoisted, the seminar may be cancelled or postponed. Please refer to the Association's announcement on its website on the day of the seminar.