

**HK TRUSTEES' ASSOCIATION LTD**  
**c/o Deacons**  
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**WHERE DO FATCA FINAL REGS LEAVE MPFs, ORSOs**  
**AND THEIR TRUSTEES?**

Speakers: Ms Angelica Kwan (Partner, PricewaterhouseCoopers Hong Kong)  
Mr Duncan Fitzgerald (Partner, PricewaterhouseCoopers Hong Kong)

Date: Wednesday, 6<sup>th</sup> March 2013

Time: 6.00 p.m. – 7.00 p.m.

Venue: PricewaterhouseCoopers, 21/F Edinburgh Tower,  
The Landmark, 15 Queen's Road Central, Hong Kong

**Ms Kwan** is a US tax partner of PwC Hong Kong active on FATCA. Like HKTA representatives, she is part of the Joint Industry FATCA Working Group in Hong Kong. In addition to FATCA, Ms Kwan assists on US tax aspects of cross-border structuring, M&A deals, private equity and hedge fund formation, and US tax consulting and compliance projects for corporate and fund clients.

**Mr Fitzgerald** is a partner within PricewaterhouseCoopers' Risk and Controls Solutions practice. He leads the firm's services in the areas of Internal Audit, Corporate Governance and Internal Controls Consulting for Financial Services clients in Hong Kong. He has worked with numerous public and private sector clients helping establish and/or review their corporate governance frameworks, risk management structures and internal controls. Mr Fitzgerald is a core member of the global PwC FATCA team. He has led an Asia FATCA readiness assignment at one of the world's largest asset management services companies. He has also been involved in determining the FATCA implications of various Hong Kong specific products and investment schemes.

The FATCA (Foreign Account Tax Compliance Act) final regulations were released by the US government mid January! This seminar explores whether the final reg provisions help MPFs, ORSOs and their trustees. Can MPFs and ORSOs qualify for one or more of the 6 new categories of retirement fund-specific rules in the final regs? If some funds can't, why not? In addition, this seminar provides an update on other rules in the FATCA final regs of interest to MPFs, ORSOs and their trustees.

Join this seminar to jump start your thinking about the FATCA final regs, and to gain added perspective on how retirement schemes you serve, or you as a trustee, can deal with FATCA.

Those interested should register using the attached seminar enrolment form.

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**SEMINAR ENROLMENT FORM**

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The cost per person is HK\$300 for members of the HK Trustees' Association Ltd\*, HKIFA, HKFI and STEP, and HK\$400 for non-members. (\*Any staff member of the HKTA, HKIFA and HKFI can attend the seminar at a cost of HK\$300). Applications for ten or more members can enroll at a special discount fee of HK\$275 per person. Please complete this form and return it to us at the above address with your cheque made payable to **HK Trustees' Association Limited**

Name of Member/Company \_\_\_\_\_

Name(s) of attendee(s) \_\_\_\_\_

\_\_\_\_\_

Cheque total: \_\_\_\_\_ Cheque No. \_\_\_\_\_

Contact Person: \_\_\_\_\_ Telephone: \_\_\_\_\_

Email: \_\_\_\_\_ Fax: \_\_\_\_\_

(NB: Payments are non-refundable unless the event is cancelled by the Association.  
Bookings are only confirmed with payment, on a first-come, first-served basis)