

THANK YOU!
REVIEW YOUR JOURNEY
WITH HK4FAMILIES



HK4FAMILIES



TAI KWUN JC CUBE
10 HOLLYWOOD ROAD, CENTRAL



香港中文大學
The Chinese University of Hong Kong



Centre for
Family Business

DAY ONE SESSION

24 JAN
MORNING

9:30 - 10:00

REGISTRATION

📍 **TAI KWUN JC CUBE**
10 Hollywood Road, Central

10:00 - 10:20

WELCOME ADDRESS



PROF. ANTHONY T.C. CHAN
Pro-Vice-Chancellor
The Chinese University of Hong Kong

10:20 - 10:40

KEYNOTE SPEECH

THE JOURNEY OF PROFESSIONAL DEVELOPMENT IN FAMILY OFFICES



ANGEL CHIA
Executive Director
Hong Kong Academy for Wealth Legacy



MARSHALL JEN
Executive Director
CUHK Centre for Family Business

10:40 - 11:10

FEATURE PRESENTATION

THE EVOLVING LANDSCAPE OF TALENT DEVELOPMENT IN FAMILY OFFICES



VICTORIA WANG
Adjunct Associate Professor
CUHK Business School



MARSHALL JEN
Executive Director
CUHK Centre for Family Business

11:10 - 11:20

A CELEBRATION TO THE FUTURE OF FAMILY OFFICE TALENTS

11:20 - 11:50

COFFEE BREAK

11:50 - 13:10

FIBI (FAMILY-IN-BUSINESS INTELLIGENCE) TALK



**CHRISTOPHER
AW**
Partner
Argonautic Ventures



**GREGORY
CAROSIN**
Head of Business
Transformation & Marketing
ABC Banking Corporation



**JAMES THOMSON-
SAKHRANI**
Managing Director
The Amber Foundation



**HAMPTON
TAO**
Investment Manager
New Heritage Group

13:10 - 14:30

NETWORKING AND LUNCH BREAK

DAY ONE SESSION

24 JAN
AFTERNOON

14:30 - 14:40

WELCOME BACK ADDRESS

14:40 - 17:40

TRACK 1

STRUCTURING WIN WIN SITUATIONS WITH FAMILIES AS AN INVESTMENT MANAGER FOR IMPACT INVESTING

📍 **TAI KWUN JC CUBE** +📶 **ONLINE**
10 Hollywood Road, Central

PRACTITIONER SPEAKERS + PANEL MODERATOR



DAVID VON EIFF
Director
(Global Industry Standards)
CFA Institute



TIM CHAN
Vice Chair, Continuing
Education Committee
CFA Society Hong Kong



BRIAN LI
Member
ACCA Hong Kong Committee

FAMILY SPEAKERS



CHRISTOPHER AW
Partner
Argonautic Ventures



HAMPTON TAO
Investment Manager
New Heritage Group



JAMES THOMSON-SAKHRANI
Managing Director
The Amber Foundation

"Please be reminded that the two learning journeys will be parallel at separate venues."

TRACK 2

THE ROLE OF A CHIEF LEARNING OFFICER IN A FAMILY OFFICE IN CREATING A FAMILY LEARNING CULTURE

📍 **JULIUS BAER** +📶 **ONLINE**
39/F, One International Finance Centre, 1 Harbour View Street, Central

PRACTITIONER SPEAKERS + PANEL MODERATOR



CHRISTIAN STEWART
Managing Director
Family Legacy Asia



MATTHEW FLYNN
Managing Director
GCP Asia Ltd



WISDOM HON
Consultant
C. P. Lin & Co. Solicitors
& Notaries



PATRICIA WOO
Partner and Global Co-head of
Family Office Team
Squire Patton Boggs

FAMILY SPEAKERS



GREGORY CAROSIN
Head of Business
Transformation & Marketing
ABC Banking Corporation



RAY WONG
Partner
Asymmetry Capital



BRIAN AH-CHUEN
Managing Director
ABC Banking Corporation

17:40 - 18:00

CONCLUDING REMARKS



FRANK NG
Associate Director
CUHK Center for
Entrepreneurship



HARRY YU
Honorary Director
CUHK Centre for
Family Business



MARSHALL JEN
Executive Director
CUHK Centre for
Family Business



ANTHONY YUEN
Honorary Senior
Project Director
CUHK Centre for
Family Business

18:00 - 19:00

NETWORKING RECEPTION

📍 **TAI KWUN JC CUBE**
10 Hollywood Road, Central

DAY TWO SESSION

25 JAN
MORNING

09:30 - 10:00

REGISTRATION

10:00 - 13:00

TRACK 1

**GUIDING FAMILY'S FUTURE SUCCESS
WITH WILL AND PROBATE**

📍 **TAI KWUN JC CUBE** + **ONLINE**

10 Hollywood Road, Central

PRACTITIONER SPEAKERS + PANEL MODERATOR



BRUCE FU

Consultant
Tsang, Chan & Woo Solicitors & Notaries



PETER TSANG

Member of the Probate Committee
The Law Society of Hong Kong

FAMILY SPEAKERS



BRIAN AH-CHUEN

Managing Director
ABC Banking Corporation



MAHESH HARILELA

Family Council
Harilela Group

"Please be reminded that the two learning journeys will be parallel at separate venues."

TRACK 2

**CRAFTING CUSTOM SOLUTIONS AS A
FAMILY ADVISOR FOR UNIQUE FAMILY NEEDS**

📍 **PWC** + **ONLINE**

21/F, Edinburgh Tower, The Landmark, 15 Queen's Road, Central

PRACTITIONER SPEAKERS + PANEL MODERATOR



GREGG LI

Adjunct Professor and Retired Ambassador
ICMCI



JOY CHEN

Partner
PwC Private Clients and Family Office
Services Hong Kong

FAMILY SPEAKERS



JOHN MOK

Chairman
AML Holdings Ltd



GREGORY CAROSIN

Head of Business Transformation & Marketing
ABC Banking Corporation

13:00 - 14:30

NETWORKING AND LUNCH BREAK

DAY TWO SESSION

25 JAN
AFTERNOON

14:30 - 14:50

WELCOME BACK ADDRESS

📍 **TAI KWUN JC CUBE**

10 Hollywood Road, Central

14:50 - 16:35

BALANCING TRADITION AND INNOVATION, THE ARTS AND SCIENCE OF FAMILY OFFICE

LECTURE SPEAKERS



MARSHALL JEN

Executive Director
CUHK Centre for
Family Business



KEVIN AU

Director
CUHK Centre for
Family Business



HARRY YU

Honorary Director
CUHK Centre for
Family Business

16:35 - 16:55

CLOSING REMARKS



REGINA HO

Principal of Private Office
AOP Capital



HARRY YU

Honorary Director
CUHK Centre for
Family Business

16:55 - 17:55

NETWORKING RECEPTION

DAY ONE SESSION

TRACK 1

STRUCTURING WIN WIN SITUATIONS WITH FAMILIES AS A INVESTMENT MANAGER FOR IMPACT INVESTING

This CPD-certified workshop, collaborated with ACCA and the CFA Institute, explores the growing importance of impact investing activities and its role in preserving a family's legacy through philanthropy works and social responsibility. The session highlights how families can align wealth management with their core values to drive meaningful change.

Participants will gain insights into innovative strategies for managing family mandate to create measurable social and environmental impact. Through expert guidance, they'll learn to balance financial goals with purpose, fostering sustainable growth and building a lasting, values-driven legacy.

TRACK 2

THE ROLE OF A CHIEF LEARNING OFFICER IN A FAMILY OFFICE IN CREATING A FAMILY LEARNING CULTURE

This CPD workshop, in collaboration with STEP, offers valuable insights into enhancing family office practices and fostering sustainable family wealth. Key topics include the five capitals model of family wealth, the emerging role of the Chief Learning Officer, and the importance of balancing structural advisors and helping professionals.

Participants will explore frameworks for effective collaboration, minimizing triangular communication, and understanding the difference between helping and rescuing families. The workshop also emphasizes next-generation education and development, equipping professionals with tools to support multigenerational success in family enterprises.

PRACTITIONER SPEAKERS + PANEL MODERATOR



DAVID VON EIFF
Director (Global Industry Standards)
CFA Institute



TIM CHAN
Vice Chair, Continuing Education Committee
CFA Society Hong Kong



BRIAN LI
Member
ACCA Hong Kong Committee

FAMILY SPEAKERS



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Investment Manager
New Heritage Group



JAMES THOMSON-SAKHRANI
Managing Director
The Amber Foundation

PRACTITIONER SPEAKERS + PANEL MODERATOR



CHRISTIAN STEWART
Managing Director
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MATTHEW FLYNN
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WISDOM HON
Consultant
C. P. Lin & Co. Solicitors & Notaries



PATRICIA WOO
Partner and Global Co-head of
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FAMILY SPEAKERS



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Head of Business Transformation & Marketing
ABC Banking Corporation



RAY WONG
Partner
Asymmetry Capital



BRIAN AH-CHUEN
Managing Director
ABC Banking Corporation

DAY TWO SESSION

TRACK 1

GUIDING FAMILY'S FUTURE SUCCESS WITH WILL AND PROBATE

In collaboration with The Law Society of Hong Kong, this CPD workshop highlights the critical importance of having a will while exploring the concept of "Instruments of Peace" in succession planning. Featuring valuable insights from a panel of experienced older-generation leaders, the workshop offers participants a comprehensive understanding of the initiator's thought process when planning for the next generation.

Key discussions will focus on fostering harmony, ensuring clear communication, and addressing potential challenges to achieve effective and peaceful family wealth transitions.

TRACK 2

CRAFTING CUSTOM SOLUTIONS AS A FAMILY ADVISOR FOR UNIQUE FAMILY NEEDS

This CPD workshop, collaborated with HKIoD, explores crafting solutions for family clients facing complex "wicked problems," emphasizing governance, succession, and family business dynamics. Participants will learn to navigate challenges using systems thinking, co-creation, and rapid prototyping. Key topics include family governance, leadership development, and aligning family values with business goals. Featuring a panel from two family members that had successfully used governance to address their challenges, the session enhances advisory skills and fosters sustainable family enterprises.

PRACTITIONER SPEAKERS + PANEL MODERATOR



BRUCE FU
Consultant
Tsang, Chan & Woo Solicitors & Notaries



PETER TSANG
Member of the Probate Committee
The Law Society of Hong Kong

FAMILY SPEAKERS



BRIAN AH-CHUEN
Managing Director
ABC Banking Corporation



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Family Council
Harilela Group

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GREGG LI
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JOY CHEN
Partner
PwC Private Clients and Family Office
Services Hong Kong

FAMILY SPEAKERS



JOHN MOK
Chairman,
AML Holdings Ltd



GREGORY CAROSIN
Head of Business Transformation & Marketing
ABC Banking Corporation

LECTURE SPEAKERS



MARSHALL JEN
Executive Director
CUHK Centre for Family Business



KEVIN AU
Director
CUHK Centre for Family Business



HARRY YU
Honorary Director
CUHK Centre for Family Business

LECTURE

BALANCING TRADITION AND INNOVATION, THE ARTS AND SCIENCE OF FAMILY OFFICE

Join senior members of the CUHK Centre for Family Business in this insightful lecture on balancing family legacy with innovation in family offices. Through case studies, interactive discussions, and live polls, gain practical insights into succession planning, governance, and values-driven investments to support multigenerational success.

HK4F SKILLMAPPING TOOL

FAMILY OFFICE GOALS ARE THE FOUNDATION FOR PRESERVING AND GROWING LONG-TERM FAMILY WEALTH, LEGACY, AND GOVERNANCE. THEY SHAPE STRATEGIC PLANNING, DECISION-MAKING, AND OPERATIONS, BALANCING FINANCIAL OBJECTIVES, PHILANTHROPY, AND FAMILY VALUES. EXPLORE OUR AI TOOL TO DISCOVER HOW YOUR SKILLS CAN CONTRIBUTE TO THE EVOLVING FAMILY OFFICE ECOSYSTEM AND DRIVE MEANINGFUL IMPACT SIMPLY BY UPLOADING YOUR RESUME



Collaborating Organizations



Hong Kong Academy for
Wealth Legacy
香港財富傳承學院



CFA Institute



Think Ahead



THE
LAW SOCIETY
OF HONG KONG
香港律師會



STEP
ADVISING FAMILIES ACROSS GENERATIONS



香港董事學會
The Hong Kong Institute of Directors
FOUNDED 1997



FAMILY OFFICE
ASSOCIATION
HONG KONG

Supporting Organizations



pwc



王道家族辦公室
ROYAL FAMILY OFFICE



香港保險業聯會
The Hong Kong Federation of Insurers



香港財務策劃師學會
INSTITUTE OF FINANCIAL PLANNERS OF HONG KONG



註冊財務策劃師協會
Society of Registered
Financial Planners



CFA Society
Hong Kong



Fung Yu
丰裕信托



Sustainable
Finance
initiative



2ECONOMY
2ECONOMY ENTREPRENEUR ASSOCIATION



Executive
Education



香港信託人公會
Hong Kong Trustees' Association

THIS IS HOW YOU CAN REDEEM YOUR CPD HOURS

1 EARN STAMPS

- Make sure you collect stamps after you had stayed the session of the workshop you attend.



2 SUBMIT YOUR STAMPING PAGE

- Take a clear picture of the page in your booklet where your stamps are recorded.
- Ensure your **full name** is visible in the photo.



3 SEND VIA WHATSAPP

- Send the photo to our WhatsApp number at 5922 2180. This is also the number we Whatsapp'd you for confirmation.



4 RECEIVE YOUR CERTIFICATE

- Once your submission is verified, you will receive an **e-copy of your Certificate of Completion** via WhatsApp.
- This certificate will reflect the total number of CPD hours earned based on the stamps you've collected.



YOUR JOURNEY WITH HK4FAMILIES

FIRST NAME:

LAST NAME:

3 CPD HOURS

Structuring Win Win Situations with Families as a Investment Manager for Impact Investing

3 CPD HOURS

The Role of a Chief Learning Officer in a Family Office in Creating a Family Learning Culture

3 CPD HOURS

Guiding family's future success with Will and Probate

3 CPD HOURS

Crafting Custom Solutions as a Family Advisor for Unique Family Needs

1.5 CPD HOURS

Balancing Tradition and Innovation, the Arts and Science of Family Office