



香港信託人公會  
Hong Kong Trustees' Association

## HKTA seminar

# Utilising offshore trusts as tool for estate planning, family governance and managing risk

### The Talk will cover:

Utilising offshore trusts as tool for estate planning, family governance and managing risk

- When is an offshore trust appropriate (focusing on Cayman/BVI)?
- What are some of the advantages and disadvantages of trusts in these jurisdictions, including a summary of how trusts are impacted by the applicable regulatory and information reporting regimes.
- Unique features of certain offshore trust regimes, such as STAR in the Cayman Islands and VISTA in the BVI.
- Pre-IPO trusts.
- How to utilise an offshore trust to achieve certain family governance or estate planning objectives with practical examples.

20  
FEB  
2025

Thursday  
5.00PM -6.30PM

Hong Kong Management Association  
14/F, Fairmont House, 8 Cotton Tree Drive, Central, HK

### Speakers:

CONYERS  
康德明律師事務所

- Mr. Peter Ch'ng, Partner, Conyers Dill & Pearman
- Mr. Wesley O'Brien, Counsel, Conyers Dill & Pearman



1.5 HKTA CPD points  
1.5 CPD points for Law  
Society being applied for



English



HKTA member \$500  
Non-member \$600





## Speakers

- **Mr. Peter Ch'ng, Partner, Conyers Dill & Pearman**

Peter Ch'ng is Partner in the Hong Kong office of Conyers. He joined Conyers in 2001 and was a Director in the Bermuda office prior to relocating to Conyers' Hong Kong office in 2017. His corporate practice is wide ranging with special focus on insurance and reinsurance, private client and trust.

Peter is a multi-disciplinary lawyer with over 25 years of professional experience in general corporate and commercial matters across multiple jurisdictions.. His offshore law practice spans across private client & trust, mergers and acquisitions, insurance and reinsurance, licensing and formations launches including ILS structures, investment funds, segregated portfolios company (SPC) and segregated accounts company (SAC), private equity partnership formations, structured finance, special purpose vehicles and ownership-remote structures including charities, debt and equity offerings, IPOs and private placements, banking and financial services including financial derivatives, credit and security.

Peter is uniquely positioned in Asia to serve insurance/ reinsurance market in Asia to provide offshore insurance/ re-insurance legal advice to Asia-based sponsors, including the licensing and formation of Bermuda, Cayman Islands and BVI insurance/ reinsurance companies. He acts as Bermuda and BVI legal counsel and provides legal and regulatory advice to the Bermuda and BVI licensed insurers operating in Greater China area.

He had also served as a director on the boards of software technology and consumer goods companies based in Bermuda.

Peter is consistently recognised by independent legal directories including Legal 500 for his work in corporate and commercial and insurance/reinsurance. Conyers insurance practice won the "Insurance & Reinsurance" China Business Law Awards by China Business Law Journal.

Peter is admitted to the Bar Associations and the Law Societies in BVI, Bermuda, United Kingdom, New York and Singapore.



## Speakers

- **Mr. Wesley O'Brien, Counsel, Conyers Dill & Pearman**

Wesley O'Brien is a Counsel in the Cayman Islands Private Client & Trust practice. He is currently on secondment in Conyers' Hong Kong office.

Wesley has a broad practice encompassing all aspects of private client and trust law advice and litigation, as well as advising on structuring for web3 and digital asset matters.

Wesley advises on the establishment, reorganisation and governance of complex trusts, pensions, foundation companies and other wealth management structures and is also regularly engaged to advise on estate planning, contentious trust and probate matters, as well as a range of regulatory matters, including the application of economic substance and exchange of information laws. Wesley has significant experience in relation to web3, crypto and digital assets matters, in particular with respect to the structuring, governance and regulation of Cayman Islands foundation companies in connection with decentralised autonomous organisations (DAOs) and token issuances.

Prior to joining Conyers, Wesley practiced as a tax lawyer at a leading Australian law firm. His experience advising on complex tax matters continues to provide valuable insight and understanding of the challenges and issues facing many of his clients.



# HKTA Seminar: Utilising offshore trusts as tool for estate planning, family governance and managing risk



## Enrolment Form

Date : **20 February 2025 (Thursday)** Time : **5:00pm - 6:30pm**

Language : **English**

Fee : **\$500 HKTA member**  
**\$600 Non-member**

Venue : 14/F, Fairmont House, 8 Cotton Tree Drive, Central, HK

CPD credit : **1.5 HKTA CPD points & Law Society being applied for**

### ■ Company Details

Company Name :

Contact Person :

Email :

Phone Number :

### ■ Attendee(s) Details

First name	Last Name	Email	Tel no.	Fee
				<input type="checkbox"/> \$500 HKTA member <input type="checkbox"/> \$600 Non-member
				<input type="checkbox"/> \$500 HKTA member <input type="checkbox"/> \$600 Non-member
				<input type="checkbox"/> \$500 HKTA member <input type="checkbox"/> \$600 Non-member
				<input type="checkbox"/> \$500 HKTA member <input type="checkbox"/> \$600 Non-member
				<input type="checkbox"/> \$500 HKTA member <input type="checkbox"/> \$600 Non-member

Total:

### ■ Payment method

- ☐ Cheque payment (payable to “**HK TRUSTEES’ ASSOCIATION LTD**”) is attached and sent 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 seminar date on it) to [carmenwong@hktrustees.com](mailto:carmenwong@hktrustees.com). Please include payment of all bank charges if you settle the payment via bank remittance.

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

#### Note:

- 1.Enrolments with full payment are accepted on a first-come-first-served basis.
- 2.Staff of the Corporate member can enjoy member’s rate for the enrolment.
- 3.Post payment and 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 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). Seminar recording is not available.
- 6.The e-Attendance certificate will be issued within 10 working days after the seminar.
- 7.Attendees must provide and sign in the seminar with the same full name provided in this enrolment form.
- 8.No CPD point will be granted if the attendee is late or early departure for 10 minutes for the seminar.
- 9.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.

Do you require a CPD Certificate?

☐ Yes,  
CTP no.

☐ No