

Hong Kong Trustees' Association  
Candidates for Election/Re-election to the 2024 Executive Committee

Existing Executive Committee:

1.

<b>Name</b>	<b>Ka Shi Lau</b>
<b>Job Title and Company</b> (for corporate member)	Senior Advisor, BCT Group (BCT Financial Ltd. & Bank Consortium Trust Co. Ltd.)
<b>Areas of experience/profession/contribution to work of HKTA</b>	Ka Shi has been - representing the MPF trustees/sponsors , fund trustees and custodian groups on initiatives relating to pensions and funds; and - working closely with government officials, regulators, professional bodies, market players and academia for exchanging knowledge and addressing issues of interest related to retirement protection and fiduciary services
<b>Years of serving at the Executive Committee</b>	Since 2003
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	Chairman Co-Chairman, Pensions and Funds sub-committee
Standing for	Standing for re-election on Executive Committee as representative of BCT Group

2.

<b>Name</b>	<b>Michael Raymond Shue</b>
<b>Job Title and Company</b> (for corporate member)	Managing Director, Tricor Services Limited
<b>Areas of experience/profession/contribution to work of HKTA</b>	Trusts and family succession planning  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.
<b>Years of serving at the Executive Committee</b>	Since 2009
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	Vice Chairman Co-Chairman, China Development sub-committee. Co-Chairman, Legislation & Regulatory Sub-committee
Standing for	Standing for re-election on Executive Committee as representative of Tricor Services Limited

3.

<b>Name</b>	<b>Carolyn Butler</b>
<b>Job Title and Company</b> (for corporate member)	Managing Director, International Fiduciaries Limited
<b>Areas of experience/profession/contribution to work of HKTA</b>	Experienced in private & corporate trusts, funds, pension schemes, trustee & fiduciary services. Responsible for delivery of HKTA Trust Training Course and co-ordinating its current revamp
<b>Years of serving at the Executive Committee</b>	Since 2003
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	Co-Chairman, Education sub-committee
Standing for	Standing for re-election on Executive Committee as representative of International Fiduciaries Limited

4.

<b>Name</b>	<b>Cheng Lai Ching Christy</b>
<b>Job Title and Company</b> (for corporate member)	Head of Fiduciary Services, HK - Financing & Securities Services at Standard Chartered Bank Hong Kong
<b>Areas of experience/profession/contribution to work of HKTA</b>	<p>The trustee experiences cover MPF schemes; APIF; SFC authorized funds including ETF and public OFC; private funds including private OFC, SPAC, etc. and that support end to end processes from corporate management &amp; governance, business development, clients management, compliance analysis &amp; documents review; oversight of service providers (including custody &amp; fund services) and operational processes; projects &amp; systems management; staffing and talents development, etc.</p> <p>With the foregoing, this facilitates supporting HKTA to conduct regulatory communication (and lobby); share experience for maintaining the best industry standards &amp; approach; attract talents, etc.</p>
<b>Years of serving at the Executive Committee</b>	Since July 2023
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	N/A
Standing for	Standing for re-election on Executive Committee as representative of Standard Chartered Bank Hong Kong

5.

<b>Name</b>	<b>Fan Choi</b>
<b>Job Title and Company</b> (for corporate member)	Managing Director, Union Bancaire Privee, UBP SA, Hong Kong Branch
<b>Areas of experience/profession/contribution to work of HKTA</b>	Wealth planning for HNWIs involving trusts and other fiduciary structures.
<b>Years of serving at the Executive Committee</b>	Since 2015
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	Co-Chairman, Best Practices sub-committee Co-Chairman, Professional Development and Training sub-committee.
Standing for	Standing for re-election on Executive Committee as representative of Union Bancaire Privee, UBP SA, Hong Kong Branch

6.

<b>Name</b>	<b>Chow Yu Rebecca</b>
<b>Job Title and Company</b> (for corporate member)	Retiree  Former Managing Director of Trident Trust Hong Kong specialises in private trust and corporate service advisory
<b>Areas of experience/profession/contribution to work of HKTA</b>	With a robust skill set that includes Fund Administration, Private Equity, Management, Investments, Family Office and more, Rebecca Chow contributes valuable insights to the industry.
<b>Years of serving at the Executive Committee</b>	Since 2013
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	Co-Chairman, Membership sub-committee
Standing for	Standing for re-election on Executive Committee as Individual Member

7.

<b>Name</b>	<b>Ross Davidson</b>
<b>Job Title and Company</b> (for corporate member)	Registered Foreign Lawyer, Stephenson Harwood's Hong Kong office.
<b>Areas of experience/profession/contribution to work of HKTA</b>	Ross is an experienced private wealth lawyer based in Stephenson Harwood's Hong Kong office. He has expertise in international tax, trust law and cross-border estate planning. Ross is qualified in England and Wales and has completed the Society of Trust and Estate Practitioners (STEP) Advanced Certificates in UK Tax for International Clients, Advising the Family Business, and Family and Business Governance.
<b>Years of serving at the Executive Committee</b>	Since November 2023
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	N/A
Standing for	Standing for re-election on Executive Committee as representative of Stephenson Harwood

8.

<b>Name</b>	<b>Amy Fung</b>
<b>Job Title and Company</b> (for corporate member)	Head of Fund Business , BOCI-Prudential Trustee Limited
<b>Areas of experience/profession/contribution to work of HKTA</b>	Ms. Fung has over 20 years of extensive experience in the financial industry. She has joined BOCI-Prudential Trustee Limited since November 2019 and is responsible for new business development and client relationship of the Fund Sector clients.
<b>Years of serving at the Executive Committee</b>	Since July 2023
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	Hon Treasurer
Standing for	Standing for re-election on Executive Committee as representative of BOCI-Prudential Trustee Limited

9.

<b>Name</b>	<b>Ma Yuk Sheung Loretta</b>
<b>Job Title and Company</b> (for corporate member)	Consultant  Loretta had served in the roles of Head of Client Management at HSBC Trustee and Head of Trust at State Street Trustee before she retired in June 2015.
<b>Areas of experience/profession/contribution to work of HKTA</b>	Corporate trust, funds and pension
<b>Years of serving at the Executive Committee</b>	Since 2007
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	Co-Chairman, Pensions and Funds sub-committee Co-Chairman, Best Practices Sub-committee
Standing for	Standing for re-election on Executive Committee as Individual Member

10.

<b>Name</b>	<b>Liza Pang</b>
<b>Job Title and Company</b> (for corporate member)	Executive Director, Trust Services, ZEDRA
<b>Areas of experience/profession/contribution to work of HKTA</b>	Liza is a Trust & Estate Practitioner (TEP) and a Certified Public Accountant of the State of Washington, USA with over 20 years of experience in tax, trust and private wealth structuring. Liza has worked for a “Big 4” accounting firm in its Hong Kong, Shanghai and Shenzhen offices specialising in individual income tax. She then joined a renowned bank trustee company where she gained her trust knowledge and experiences in servicing high-net-worth individuals and families from various jurisdictions.
<b>Years of serving at the Executive Committee</b>	Since September 2023
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	N/A
Standing for	Standing for re-election on Executive Committee as representative of ZEDRA

11.

<b>Name</b>	<b>Peter So</b>
<b>Job Title and Company</b> (for corporate member)	Partner, Deacons
<b>Areas of experience/profession/contribution to work of HKTA</b>	Peter specialises in litigation and dispute resolution and advises on a broad range of commercial disputes and contentious matters, including regulatory investigations by the SFC, HKMA, ICAC and Hong Kong Competition Commission (HKCC), financial institutions and banking litigation, arbitrations, shareholder disputes, disputes amongst members of high net worth families, injunctions and asset tracing.
<b>Years of serving at the Executive Committee</b>	Since May 2023
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	Hon Secretary
Standing for	Standing for re-election on Executive Committee as representative of Deacons

12.

<b>Name</b>	<b>Zau Ai Wei Audrey</b>
<b>Job Title and Company</b> (for corporate member)	Managing Director, Lombard Odier (Hong Kong) Ltd
<b>Areas of experience/profession/contribution to work of HKTA</b>	Experienced private wealth professional with a demonstrated history of providing wealth management and wealth planning solutions to high net worth clients in Hong Kong and the rest of Asia. She is serving on the STEP/HKTA joint China Sub-Committee. She will apply her experience in private client work and industry network towards contributing to HKTA.
<b>Years of serving at the Executive Committee</b>	Since 2023
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	N/A
Standing for	Standing for re-election on Executive Committee as Individual Member

## New Candidates for Election:

13.

<b>Name</b>	<b>Phillip Bretnall</b>
<b>Job Title and Company</b> (for corporate member)	Managing Director, Head of Global Trustee and Fiduciary Services ASP, Securities Services, The Hongkong and Shanghai Banking Corporation Limited
<b>Areas of experience/profession/contribution to work of HKTA</b>	Phillip is a seasoned pensions professional with 40 years of experience across a wide variety of roles including senior roles at outsourced pensions providers, to COO of the largest occupational DC scheme in the UK and the UK Pensions Regulator. The last 8 years of his career have been with HSBC in Hong Kong as CEO of HSBC Provident Fund Trustee (Hong Kong) Limited, the largest MPF trustee in Hong Kong and also Head of Pensions Oversight for ORSO schemes under the trusteeship of HSBC.  <a href="#">Attached Biography</a>
<b>Years of serving at the Executive Committee</b>	N/A
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	N/A
Standing for	Standing for election on Executive Committee as representative of HSBC Institutional Trust Services (Asia) Limited

14.

<b>Name</b>	<b>Rosana Hoyan</b>
<b>Job Title and Company</b> (for corporate member)	Head of Legal, Principal Trust Company Asia Limited
<b>Areas of experience/profession/contribution to work of HKTA</b>	Solicitor qualified in Hong Kong, England & Wales and a qualified New York attorney. Areas of expertise: Legal and regulatory expertise in pension funds, retail funds, private funds and asset management.  <a href="#">Attached Biography</a>
<b>Years of serving at the Executive Committee</b>	N/A
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	N/A
Standing for	Standing for election on Executive Committee as representative of Principal Trust Company Asia Limited

15.

<b>Name</b>	<b>Elaine Lau</b>
<b>Job Title and Company</b> (for corporate member)	Chief Executive Officer, AIA Company (Trustee) Limited
<b>Areas of experience/profession/contribution to work of HKTA</b>	<p>Elaine oversees the company's trustee business and is responsible for maintaining a robust governance and risk management framework for regulatory compliance. She is also responsible for leading the eMPF project to ensure smooth onboarding. Elaine has over 25 years of experience in the financial services industry. Prior to joining AIA in 1998, Elaine led the Pensions and Group Savings Department of Toronto-Dominion Bank, Canada.</p> <p><a href="#">Attached Biography</a></p>
<b>Years of serving at the Executive Committee</b>	Elaine served at the HKTA Exco from 2012 to 2018
<b>Current serving position</b> ( <i>i.e. Chair/Vice Chair or chair/co-chair of subcommittee</i> )	N/A
Standing for	Standing for election on Executive Committee as representative of AIA Company (Trustee) Limited