香港信託人公會
Hong Kong Trustees' Association

JOINT WEBINAR SERIES WITH INVEST HONG KONG ON FAMILY OFFICE IN HONG KONG

<u>Session A</u>

Topic:	Family office in Hong Kong (session A)
Speakers:	Carolyn Butler, Managing Director, International Fiduciaries Limited & Executive Committee Member, HKTA Stefano Mariani, Partner, Deacons & Honorary Secretary, HKTA Jurg Niederberger, CEO/CIO, Quintar Capital
Date:	Wednesday 14 July 2021
Time:	4:30pm – 6:00pm
CPD point:	1.5 points for HKTA Certified Trust Practitioner ™
Fee:	Please refer to the information on the Enrolment form

This session will cover:

- Licensing issues when setting up a family office
- Taxation issues for family office
- Why choose Hong Kong as your family office location
- Q&A session

About the speakers:

<u>Carolyn Butler, International Fiduciaries Limited & Executive Committee Member, HKTA</u>
Carolyn Butler is the Managing Director of International Fiduciaries Limited. She has 30 years' experience in the financial services industry; the past 25 years of which have been in Asia. She has extensive expertise and knowledge of both private and corporate trusts, investment management and the retirement schemes industries and acts as an independent director for an MPF scheme. Carolyn is Chairman of the Education Sub-Committee of Hong Kong Trustees' Association and a past Chairman of the HKTA. She is a fellow of the Hong Kong Securities and Investment Institute. She has a Bachelor of Business degree, an MBA and a Masters of Business Law.

<u>Stefano Mariani, Partner, Deacons & Honorary Secretary, HKTA</u>
Stefano Mariani (MA (Oxon), MSc (LSE)) heads the tax and trusts practice at Deacons. He was called to the Bar of England & Wales and is admitted as a solicitor-advocate with higher rights of audience in Hong Kong. He is an Adjunct Associate Professor of the Faculty of Law of the University of Hong Kong, the Hon. Secretary of the Hong Kong Trustees' Association, a Trusts and Estates Practitioner (STEP), and an honorary fellow of the Asian Institute of International Financial law. He is the co-author of the Encyclopaedia of Hong Kong Taxation – the seminal Hong Kong textbook on revenue law, and has been widely published in academic and industry journals.

<u>Jurg Niederberger, CEO/CIO, Quintar Capital</u>
Jurg manages all business and investment affairs of Quintar Capital, a Family Office with deep roots in Europe. He has worked for more than 20 years in the Asian financial service sector in both Hong Kong and Tokyo. While before that his career included another 12 years in roles in the European banking centres of Zurich, London and Frankfurt. He has a strong international background in credit markets, private debt, risk management, investment banking, and derivatives. He holds a Master's Degree in International Finance from the University of Amsterdam.

<u>Important note</u>: Webinar facility will be provided by Invest Hong Kong. In order to create access to the Invest Hong Kong Zoom platform, participants' names and email addresses will be passed to Invest Hong Kong upon registration with HKTA. A link will be provided to each participant 2 days prior to each webinar.

For further enquires:
Tel: 3511 6030
Email: carmenwong@hktrustees.com

Session B

Topic:	Family office in Hong Kong (session B)
Speaker:	Mike Cheung - Executive Director, Head of Goldman Sachs Family Office Asia, Wealth Advisory Services, Private Wealth Management, Goldman Sachs John Wong, Partner, Family Business and Private Client Services Leader, PwC Hong Kong Jacqueline Shek, Executive Director, Trust Services, Zedra & Chairperson, HKTA
Date:	Monday 16 August 2021
Time:	4:30pm – 6:00pm
CPD point:	1.5 points for HKTA Certified Trust Practitioner ™
Fee:	Please refer to the information on the Enrolment form

This session will cover:

- Family business succession planning
- Family governance
- Interaction of family office and family trusts
- Q&A session

About the speakers:

Mike Cheung, Executive Director, Head of Goldman Sachs Family Office Asia, Wealth Advisory Services, Private Wealth Management, Goldman Sachs

Mr. Cheung is an Executive Director on the Goldman Sachs Family Office Wealth Advisory Services team in Private Wealth Management. He is responsible for the firm's wealth advisory service for high net worth clients in Asia, and will be advancing the firm's efforts to develop customized and leading edge wealth planning solutions for clients, especially in the area of offshore trust structuring, multi-jurisdictional tax planning and estate planning.

Prior to joining Goldman Sachs, Mr. Cheung held a similar position at J.P. Morgan Private Bank based in Hong Kong, covering high net worth clients across multiple Asian jurisdictions for 5 years. In addition, Mr. Cheung came from an accounting background and he has held various regional financial analysis positions in J.P. Morgan and Citi, providing analytical and sales management support to the business.
He holds a Bachelor's Degree in Accounting and Finance from London Metropolitan University and a diploma in International Trust Management awarded by STEP in association with The University of Manchester Business School. He is a full member of the Society of Trust and Estate Practitioners (STEP).

John Wong, Partner, China Family Business and Private Client Services Leader, Pricewaterhouse Coopers Limited

John is the China Family Business and Private Client Services Leader. He has more than 30 years of experience specializing in helping high net-worth individuals and families primarily based in Asia Pacific with Chinese and other nationalities to devise tailor-made tax planning, family wealth and business succession planning to achieve the specific personal and family goals of such clients by using trusts, insurance and other appropriate structures for the implementation of such planning as well as setting up family offices and devising family governance and constitution.

He has extensive experience in advising various China and Hong Kong based international financial institutions and trustees and is also a frequent speaker at wealth forums and tax seminars.

Jacqueline Shek, Executive Director, Trust Services, Zedra & Chairperson, HKTA
Jacqueline Shek is currently the Executive Director, Trust Services at Zedra (Hong Kong) Ltd. She is dual qualified as both a Chartered Accountant (Australia & New Zealand) and a lawyer (in Hong Kong and NSW Australia). She has more than 20 years' experience in the tax & trust industry; including 5 years as in-house Global Head of Legal for HSBC's private trust business and 6 years as a Partner of Baker McKenzie Hong Kong in their tax & trust practice group. She has been serving as the Chairman of the Hong Kong Trustees' Association since 2019.

.

Important note: Webinar facility will be provided by Invest Hong Kong. In order to create access to the Invest Hong Kong Zoom platform, participants' names and email addresses will be passed to Invest Hong Kong upon registration with HKTA. A link will be provided to each participant 2 days prior to each webinar.

For further enquires:
Tel: 3511 6030
Email: carmenwong@hktrustees.com

WEBINAR ENROLLMENT FORM

Session A

Topic: Family office in Hong Kong (session A)

Speakers: Carolyn Butler, International Fiduciaries Limited & Executive Committee Member, HKTA
Stefano Mariani, Partner, Deacons & Honorary Secretary, HKTA
Jurg Niederberger, CEO/CIO, Quintar Capital

Date: Wednesday 14 July 2021

Time: 4:30pm – 6:00pm

Session B

Topic: Family office in Hong Kong (session B)

Speakers: Mike Cheung, Executive Director, Family Office Wealth Advisory Services, Private Wealth Management, Goldman Sachs
John Wong, Partner, China Family Business and Private Client Services Leader, Pricewaterhouse Coopers Limited
Jacqueline Shek, Executive Director, Trust Services, Zedra & Chairperson, HKTA

Date: Monday 16 August 2021

Time: 4:30pm – 6:00pm

Fee:

Members' rate: Session A + Session B (HK$400); Session A only (HK$250); Session B only (HK$250)

Non-members' rate: Session A + Session B (HK$450); Session A only (HK$300); Session B only (HK$300)

CPD point: 1.5 points for HKTA Certified Trust Practitioner ™ for each session

---

Name of Company ____

Name(s) of Attendee(s) ____

Contact Person: ______________________________ Phone: ___________________________

(Please provide email address of each attendee for sending confirmation of webinar link and attendance certificate)

Email: ____________________________________ Mobile: _________________________

Fee & Payment (please tick as appropriate)

☐ **Session A,** HK$250 (member) x _____________ Person = HK$_________________________

☐ **Session B,** HK$250 (member) x _____________ Person = HK$_________________________

☐ **Session A AND B,** HK$400 (member) x _____________ Person = HK$____________________

☐ **Session A** HK$300 (non-member) x __________ Person = HK$_________________________

☐ **Session B** HK$300 (non-member) x __________ Person = HK$_________________________

☐ **Session A AND B** HK$450 (non-member) x __________ Person = HK$___________________

Payment method (please tick as appropriate)

☐ Cheque payment (payable to "**HK TRUSTEES' ASSOCIATION LTD**") is attached and sent to **HKTA, Room 745, 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

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

Do you require an attendance certificate? (please tick as appropriate)

☐ Yes **(attendees must provide and sign in the e-seminar with the same full name)**
HKTA CTP no: ___________
☐ No

Personal data (please tick)
☐ I agree to have my name and email address sent to Invest Hong Kong for the purpose of attending the webinar

Future Communication
☐ I agree to receive correspondence from the HKTA about its upcoming seminars, training courses, conferences and related activities.
(Your data will not be used for other purposes and is held under strict controls in accordance with the Hong Kong Data Privacy Ordinance.)

Note:
1. Post-dated cheque will NOT be accepted.
2. Payments are non-refundable unless the event is cancelled by the Association.
3. e-Attendance certificate will be issued within 10 working days after the webinar. Attendees must provide and sign in the webinar with the same full name provided in this enrolment form.
4. In order to be eligible for HKTA CPD hours, participants are required to attend the entire webinar from 4:30pm to 6:00pm. Webinar recording is NOT available.
5. No CPD point will be granted if the attendee is late or depart early for 10 minutes for the webinar.