

FAMILY OFFICE IN HONG KONG

Supporting organisation: Invest Hong Kong

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 TM
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:

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WEBINAR ENROLLMENT FORM

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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 B (HK\$250) Non-members' rate: Session B (HK\$300)
CPD point: 1.5 points for HKTA Certified Trust Practitioner TM

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 B, HK\$250 (member) x _____ Person = HK\$ _____

☐ Session B HK\$300 (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.