

WEBINAR ON
US/PRC/HK Equity Compensation Planning: Tax & Legal Aspects

Speakers: Peter Chen, Partner, International Tax Services, Deloitte China
Winnie Chiu, Partner, Yang Chan & Jamison LLP
Tiffany Li, Director, Global Employer Services, Deloitte China
Ellen Tong, Director, Global Employer Services, Deloitte China
Esti Chui, Director, Tax & Business Advisory Services, Deloitte China

Date: 26 April 2021 (Monday)
Time: 5:00pm to 6:30pm
CPD point: 1.5 points for HKTA Certified Trust Practitioner TM and 1.5 points for Law Society
Fee: HK\$250 (member); HK\$300 (non-member)

The talk will cover:

An overview of equity compensation for employees with US/PRC/HK tax and legal implications and the use of employee benefit trusts, including but not limited to possible structure of employee benefit trusts and common issues that will arise from the use of such trusts.

About the speakers

Peter Guang Chen – Partner, International Tax Services, Deloitte China

Peter Chen is both a certified public accountant and an attorney with more than 20 years of experience in tax advisory and planning. He has advised China, Hong Kong and the US, and other multinational corporations and high net worth



individuals on their inbound and outbound transactions, China and international tax issues, investment structuring, regulatory, and business issues; mergers, acquisitions; and the reorganizations of multinationals in China and the Asia Pacific region; structuring of trusts, foundations, estate planning and asset preservation for individuals. He has represented companies and individuals to resolve tax disputes with tax authorities in China and the US.

Recently, Chen has been engaged by the Ministry of Finance of a Southeast Asian nation to draft the country's tax regulations and to provide consulting on international tax matters.

Previously, Chen was with a major economic consulting firm and also was a tax partner at Deloitte US, where he was responsible for the China Desk in New York, and served as China leader at the firm's International Centre of Excellence.

Winnie Chiu – Partner, Yang Chan & Jamison LLP

Winnie Chiu has extensive experience in Succession Planning, Will, Trust, and Probate related matters. She also handles disputes between beneficiaries; beneficiaries and the executor/administrator/trustee.



Winnie is a frequent speaker at seminars in Hong Kong, PRC, and overseas in relation to succession planning for trustee companies, bankers, investment advisors, accountants, lawyers, and high net worth individuals.

Winnie also has solid experience in handling contentious and non-contentious employment matters as well as anti-discriminations, sexual harassment, and personal data privacy related issues arising from recruitment, merger & acquisition, restructuring, and/or post-termination restrictive covenants. She regularly conducts seminars and training sessions for HR directors, professionals, and management of international companies.

Prior to joining Yang Chan & Jamison, Winnie had acted as a partner of various leading law firms, and she had also worked as an in-house lawyer for an international trust company in Hong Kong.

Tiffany Li, Director, Global Employer Services, Deloitte China

Tiffany is a Tax Director based in Deloitte Shanghai. She is a core team member of Global Employer Services (“GES”) team, with 16 years of professional experience in tax and mobility areas.



Tiffany has delivered services to a wide range of multinational companies and high growth Chinese companies covering industries including financial institutions, large manufacturing companies, Bio companies, bio-pharmaceutical companies, automotive companies, etc.

Tiffany has extensive experience in managing large mobility engagements for both MNCs and China headquartered company and has provided wide scopes of services covering inbound/outbound international assignment structuring, individual income tax compliance and consulting, compensation and benefits structuring, global equity consulting, foreign exchange consulting and tax advisory for high net worth individuals.

Tiffany is a China specialist on global equity and rewards advisory. She is the core team member of China Eastern Region Equity Champion providing comprehensive equity/rewards consulting services throughout a plan design to roll out for many multinational companies and China domestic companies. She is experienced in offering practical support for MNC clients on implementing their global equity plans in China, or helping China clients with their outbound equity strategies.

Tiffany has a Master Degree of Law from Xiamen University and an International MBA Degree from Hong Kong University. Tiffany has PRC lawyer qualification.

Ellen Tong, Director, Global Employer Services, Deloitte China

Ellen has worked for Deloitte in the U.S. and Hong Kong. As a Tax Director in the Hong Kong office, Ellen leads the U.S. Individual tax practice. Ellen is also a specialist in China individual income tax, Hong Kong individual income tax and mobility management. She has extensive experience in providing personal tax advisory and compliance services,



advising on remuneration structure, equity rewards, tax equalization/ employee’s tax assistance programs, retirement benefits planning, policy design, implementation, review, mobility management and immigration solutions to clients in different industries with a widespread and diversified workforce. Ellen is experienced in handling cross-border issues and providing practical solutions in the deployment of resources for risk and control management.

Ellen has in-depth experience in advising private and public companies on reward strategy and executive remuneration from design, implement, manage to employee communications.

Ellen also provides high-touch personal tax advice to senior executives and high net-worth individuals, and acts a trusted tax and business advisor to their family offices.

Ellen is a Certified Public Account in U.S. She is a member of both American Institute of Certified Public Accountants and California Board of Accountancy. Ellen has a Bachelor of Science degree from University of California, Berkeley.

Esti Chui, Director, Global Employer Services, Deloitte China

Esti specializes in Hong Kong Salaries Tax, PRC Individual Income tax and cross-border individual income tax matters. Esti has many years of professional tax experience including working with another Big Four accounting firm and the Inland Revenue Department.



Esti has been dealing with complex tax-related issues and mobility management, and has rich experience in handling clients from financial industry including banks, insurance company, private equity and assessment management. She also has onsite experience as mobility professional in client office. Esti is a member of the Association of Chartered Certified Accountants (“ACCA”). She is an experienced speaker in seminars and was facilitator of advanced diploma program in tax for HKICPA.

Target audience

Lawyers, CPAs, trust professionals, financial advisors, and executives of companies with equity compensation.

Important note: Webinar facility will be provided by Yang Chan & Jamison LLP. In order to create access to the Yang Chan & Jamison LLP webinar platform, participants’ names and email addresses will be passed to Yang Chan & Jamison LLP upon registration with HKTA. A link will be provided to each participants 2 days prior to each webinar.

WEBINAR ENROLLMENT FORM

Topic: Overview of Equity Compensation for Employees with US/HK/PRC Tax Implications and the Use of Employee Benefit Trusts

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Name of Company _____

Name(s) of Attendee(s) _____

Contact Person: _____ Phone: _____

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

Email: _____ Mobile: _____

Fee & Payment (please tick as appropriate)

☐ HK\$250 (HKTA/STEP member) x _____ Person = HK\$ _____

☐ 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 1103, 11/F., V Heun Building, 138 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 Yang Chan & Jamison LLP 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.)

Notes:

1. Post-dated cheque will **NOT** be accepted. Payment are non-refundable unless the event is cancelled by the Association.
2. 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.**
3. In order to be eligible to HKTA CPD hours, participants are required to attend the entire webinar from 5:00pm to 6:30pm. Webinar recording is **NOT** available.
4. No CPD point will be granted if the attendee is late or early departure for 10 minutes for the seminar/webinar.