

## WEBINAR ON

### How families can make financial plans for special needs children?

**Speakers:** (1) Sherlynn Chan, Family & Private Wealth Partner, Deacons  
(2) Hazel Wong, Senior Associate, Deacons

**Date:** Thursday 24 August 2023

**Time:** 4:30pm – 5:30pm

**Format** Webinar

**Language** English

**Fee** HK\$250 (member); HK\$300 (non-member)

**CPD point:** One point for HKTA Certified Trust Practitioner™  
One point for Law Society being applied for

**This session will cover:**

1. Mental capacity in civil matters
2. Adult guardianship
3. Legal tools for financial planning – EPA, Wills and Trusts
4. Introduction to Special Needs Trust
5. Q&A

**About the speaker:**

**(1) Sherlynn Chan** is a Family & Private Wealth Partner at Deacons. She is a fellow of the International Academy of Family Lawyers and an accredited family mediator. She previously sat as a Deputy Family Court Judge in Hong Kong and is currently a member of the Guardianship Board. Sherlynn handles complex and sensitive matrimonial cases, trust and probate disputes. She is also a leading lawyer in mental capacity law. A winner of the “15th Annual STEP Private Client Awards – Vulnerable Client Advisory Practice of the Year.” Sherlynn also authored “A Practical Guide to Mental Health Law in Hong Kong”.

**(2) Hazel Wong** has over 10 years’ extensive experience in handling a wide range of commercial work including advising on private company mergers and acquisitions, contracts involving multi-national entities with Hong Kong and Mainland China. She has extensive experience in vulnerable client matters and her commercial law experience provides an additional dimension and approach to her work. She has provided legal advisory work to committees, as well as making applications under Part II of the Mental Health Ordinance, managing financial affairs of mentally incapacitated persons in Hong Kong and overseas and advising financial institutions on related issues.

Hazel also handles wealth and succession planning matters, contentious probate and trust matters and advises charities and philanthropy work. She has been recommended in the area of Private Client and Family (Hong Kong) in Legal 500 Asia Pacific (2023).

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

## WEBINAR ENROLLMENT FORM

Topic: How families can make financial plans for special needs children?  
Speakers: Sherlynn Chan, Family & Private Wealth Partner, Deacons  
Hazel Wong, Senior Associate, Deacons  
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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 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)

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 Deacons 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.
2. Payment is non-refundable unless the event is cancelled by the Association.
3. The 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 to HKTA CPD hours, participants are required to attend the entire webinar from 4:30pm to 5:30pm. Webinar recording is **NOT** available.
5. No CPD point will be granted if the attendee is late or early departure for 10 minutes for the webinar.