

## HKTA Conference 2021

Founded in 1991, the Hong Kong Trustees' Association celebrates its 30<sup>th</sup> Anniversary this year.

The Hong Kong Trustees' Association will organize its 2021 Conference with the theme on "***Future landscape for the trust and fund industry***". The keynote speaker is Mr. Joseph Chan JP, Under Secretary for Financial Services and the Treasury, HKSAR Government.

This event will be conducted in hybrid mode. 50 seats are available only for in person attendance. Due to this limitation, ONLY HKTA members will be accepted to attend in person on first come first serve basis.

**Date:** Tuesday 23 November, 2021

**Time:** 2:30p.m. - 6:00p.m. (registration begins at 2:00 p.m.)

**Venue:** KPMG, 8/F, Prince's Building, 10 Chater Road, Central, Hong Kong

**HKTA CPD points** 3.5 points

Interested parties please complete the registration form and payment. For enquiries, please contact the HKTA Secretariat at 3511 6030 or [queries@hktrustees.com](mailto:queries@hktrustees.com)

**Supporting Organizations:** *(listed according to the alphabetical order)*

1. Asia Securities Industry & Financial Markets Association
2. Association of Family Offices in Asia
3. Companies Registry
4. Hong Kong Investment Funds Association
5. Hong Kong Securities and Investment Institute
6. Invest Hong Kong
7. KPMG
8. Mandatory Provident Fund Schemes Authority
9. Private Wealth Management Association
10. Securities and Futures Commission
11. STEP Hong Kong
12. The Financial services Development Council
13. The Hong Kong Chartered Governance Institute
14. The Hong Kong Institute of Bankers
15. The Hong Kong Institute of Certified Public Accountants
16. The Hong Kong Retirement Schemes Association

### **Future Landscape for the Trust and Fund Industry**

Date	23 November 2021 (Tuesday)
Time	2:30pm – 6:00pm (registration starts from 2:00pm)
Agenda	<b>Opening Remarks</b> Ms Jacqueline Shek, HKTA Chairperson
	<b>Keynote Address</b> Mr Joseph Chan JP, Under Secretary for Financial Services and the Treasury, HKSAR Government
	<b><u>Private Trusts</u></b>  <b>Panel Discussion on Alternative Investment Trends – considerations for trustees of private trusts when investing family wealth in virtual assets, philanthropic initiatives &amp; ESG investments</b>  <b>Panelists:</b> Ms Audrey Zau, Managing Director, Lombard Odier (Hong Kong) Limited Mr Lincoln Wong, Associate Director – Trust Services, Zedra (Hong Kong) Limited Mr Tim George, Partner, Withers Hong Kong  <b>Moderator:</b> Mr Michael Shue, HKTA China Development Sub-Committee Chairperson and Managing Director – Trust Services, Tricor
	<b>Case Study on Interaction between Family Office and Family Trust</b>  <b>Panelists:</b> Mr Christian Stewart, Founder & Managing Director, Family Legacy Asia (HK) Ltd Ms Joanne Caen, Managing Director, PraxisIFM Ms Wisdom Hon, Chief Legal and Compliance Officer, Globalway Development Ltd.  <b>Moderator:</b> Mr Dixon Wong, Head of Financial Services and Global Head of Family Office, Invest Hong Kong
	<b>Presentation by Mr Cheng Yan Chee, Acting Managing Director and Executive Director, MPFA</b>
	<b>Presentation by Ms Christina Choi, Executive Director, Investment Products, SFC</b>

	<p><b><u>Corporate Trusts</u></b></p> <p><b>Panel Discussion on Future Market Developments: opportunities and challenges in corporate trust/fund industry including RA13, ESG, cross border opportunities</b></p> <p><b>Panelists:</b>  Ms Christina Choi, Executive Director, Investment Products, SFC  Mr Thomas Kwan, CEO, Harvest Global Investments Ltd  Mr Glenn Kennedy, HKTA Executive Committee member and CEO, HSBC Institutional Trust Services (Asia) Ltd  Mr Bonn Liu, Partner &amp; Head of Asset Management, ASPAC / Head of Financial Services, Banking and Capital Markets Hong Kong, KPMG</p> <p><b>Moderator</b>  Ms Ka Shi Lau BBS, HKTA Vice-Chairperson and Managing Director &amp; CEO, BCT Group</p>
	<p><b>Update on Trust Training Certificate (TTC)</b>  Ms Carolyn Butler, HKTA Education Sub-Committee Chairperson</p>
	<p><b>Closing Remarks</b>  Ms Ka Shi Lau BBS, HKTA Vice-Chairperson</p>