

## 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***".

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.

<b>Date:</b>	Tuesday 23 November, 2021
<b>Time:</b>	2:30p.m. - 6:00p.m. (registration begins at 2:00 p.m.)
<b>Venue:</b>	KPMG, 8/F, Prince's Building, 10 Chater Road, Central, Hong Kong
<b>Fees</b>	On site participants (HKTA members only) – HK\$850 Online participants (Members of HKTA and supporting organizations): HK\$500 Online participants (Non-members) – HK\$650

**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. Hong Kong Investment Funds Association
3. Hong Kong Securities and Investment Institute
4. Invest Hong Kong
5. KPMG
6. Mandatory Provident Fund Schemes Authority
7. Private Wealth Management Association
8. Securities and Futures Commission
9. STEP Hong Kong
10. The Financial services Development Council
11. The Hong Kong Institute of Certified Public Accountants
12. 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>

**HKTA Conference 2021**  
**Future landscape for the trust and fund industry**  
**ENROLLMENT FORM**

Date: Tuesday 23 November, 2021  
Time: 2:30 p.m. - 6:00 p.m. (registration begins at 2:00 p.m.)  
Venue: KPMG, 8/F, Prince's Building, 10 Chater Road, Central, Hong Kong  
CPD points: 3.5 points for HKTA Certified Trust Practitioner™

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: \_\_\_\_\_

**Affiliation with supporting organizations**

☐ Yes (Name: \_\_\_\_\_) ☐ No

**Fee & Payment** (please tick as appropriate)

☐ **On-site:** HK\$850\* (HKTA members ONLY) x \_\_\_\_\_ Person = HK\$ \_\_\_\_\_

☐ **Online:** HK\$500 (Member of HKTA or supporting organizations) x \_\_\_\_\_ Person = HK\$ \_\_\_\_\_

☐ **Online** HK\$650 (non-member) x \_\_\_\_\_ Person = HK\$ \_\_\_\_\_

\* Your on-site enrolment will automatically be converted to online registration once seats are filled, and the difference in registration fees refunded.

**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](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 webinar with the same full name) HKTA CTP no: \_\_\_\_\_

☐ No

**Personal data** (please tick)

☐ I agree to have my name and email address sent to Plus Concepts (event organizer) 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 2:30pm to 6:00pm. 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.