

STEP HONG KONG LTD
c/o Suite 207 St George's Building
2 Ice House Street, Central
Hong Kong

Tel: 2559 7144
Email: queries@step.org.hk
Website: www.step.org/hongkong

A PANEL DISCUSSION ON
PROFESSIONALISING THE PHILANTHROPY OFFERING

Panelists: Mr Paul Angwin (People and Planet)
Mr Edwin Lee (HKCSS WiseGiving Limited)
Mr Maurice Machenbaum (WISE - philanthropy advisors)

Moderator: Ms Mimi Hutton (Withers)

Date: Thursday, 18th April 2013

Time: 6.00 p.m. – 7.00 p.m.

Venue: HK International Arbitration Centre, 38/F, Exchange Square Two,
Central, Hong Kong

.....

Panel Discussion:

As wealth grows, philanthropy often becomes an essential part of a family's activity. The new generation of wealthy are mostly entrepreneurs, and their approach to philanthropy is inspired by their experiences. They often expect more professional management and seek advice in order to maximize impact.

What is this professionalization all about and what is the role of financial and legal advisers in this context? What are the most effective ways to collaborate with philanthropy advisers? This seminar will give you a unique opportunity to meet with three leading experts in the world of philanthropy and hear more about their services and experience.

.....

Panelists / Moderator:

Paul Angwin is the Managing Director Asia Pacific, for People and Planet and has significant senior management experience in corporate social responsibility (CSR), sustainability, human rights and philanthropy with more than eleven years experience in the Asia Pacific region. His focus areas are philanthropic programs and CSR,

particularly in the areas of education, community development and disaster relief. Paul is a board member and chair of grants committee for Empower in Hong Kong (www.empowerweb.org) and curator of www.tedxwanchai.com under the title of 'Social Impact'.

Edwin Lee is a Philanthropy Advisor for HKCSS WiseGiving Limited. Edwin advises donor-clients on giving strategies, including conducting research on community needs, performing due diligence, project monitoring and evaluation on behalf of donors. WiseGiving's clients span a wide range of donors, including corporations, private foundations, community foundations and even individuals, whose charitable ambitions tackle a diverse set of social issues in Hong Kong and Mainland China.

Prior to joining the Council, Edwin was the Director of Corporate Social Responsibility for a publicly-listed real estate and hotel developer. In that capacity, he also helped manage the Chairman's own private foundation. Edwin was also Charities Manager at The Hong Kong Jockey Club, where he performed due diligence and analysis on ~HK\$800 million worth of grant applications. Before embarking on a career in philanthropy, Edwin was a Senior Associate Consultant with Bain & Company, a leading strategy consulting firm based in Boston, USA. Edwin is a Board Member of the Simon K Y Lee Foundation. He holds a Bachelor of Science in Economics magna cum laude from The Wharton School of the University of Pennsylvania, and a Master of Business Administration from Yale University.

Maurice Machenbaum has been advising European wealthy families for the last 9 years, helping them to implement a more strategic philanthropy across generations. He is the co-founder and director of **wise – philanthropy advisors (WISE)** and he is now based in Vietnam to advise Asian based families. A lawyer by training, he has been involved with the social sector for almost 20 years and became a social development and project management expert. Until recently he served as the appointed treasurer of the World Scout Committee, the main executive body of the World Organization of the Scout Movement.

WISE - philanthropy advisors is the winner of the STEP Private Client Award 2012/2013 for Philanthropy Team of the Year.

Mimi Hutton joined Withers in 2008 from Bryan Cave's Hong Kong office having more than 30 years' experience advising in Asia on US and Hong Kong trust and tax matters for individuals, families and financial institutions. She is a Hong Kong and US qualified lawyer. Mimi advises Asian clients on the creation of charitable structures and on their ongoing philanthropy. She also advises charities on tax and structuring and governance matters. She works with clients who have US family members, who are investing in the US, moving to the US or expatriating. She also advises in connection with international probate matters.

.....

Those interested should register using the attached seminar enrolment form.

STEP HONG KONG LTD
c/o Suite 207 St George's Building
2 Ice House Street, Central
Hong Kong

Tel: 2559 7144
Email: queries@step.org.hk
Website: www.step.org/hongkong

A PANEL DISCUSSION ON
PROFESSIONALISING THE PHILANTHROPY OFFERING

Panelists: Mr Paul Angwin (People and Planet)
Mr Edwin Lee (HKCSS WiseGiving Limited)
Mr Maurice Machenbaum (WISE - philanthropy advisors)

Moderator: Ms Mimi Hutton (Withers Hong Kong)

Date: Thursday, 18th April 2013

Time: 6.00 p.m. – 7.00 p.m.

Venue: HK International Arbitration Centre, 38/F, Exchange Square Two,
Central, Hong Kong

The cost per person is HK\$250 for members of the HK Trustees' Association Ltd* and STEP, and HK\$300 for non-members. (*Any staff, not only the nominated representative of the HKTA member, can attend the seminar at a cost of \$250). Applications for ten or more members can enrol at a special discount fee of \$200 per person. Please complete this form and return it to us at the above address with your cheque made payable to **STEP Hong Kong Limited**.

Name of STEP or HKTA Member:

Name(s) of
attendee(s) _____

Cheque total: _____ Cheque No. _____

Contact Person: _____ Telephone: _____

Email: _____ Fax: _____

(NB: Payments are non-refundable unless the event is cancelled by the Society.
Bookings are only confirmed with payment, on a first-come, first-served basis)