

HK TRUSTEES' ASSOCIATION LTD

PO Box 8493

GPO Hong Kong

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A SEMINAR ON

INVESTMENT OVERSIGHT FOR TRUSTEES

Speaker: Mr. Richard Sayers, Chartered FCSI (Enhance Group Ltd)

Date: 18 June 2014

Time: 6.00 p.m. – 7.00 p.m.

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

Richard is a founder of Enhance Group Limited which provides investment oversight services for trustees and private clients. Enhance produce investment portfolio reviews that consider performance, risk and suitability relative to the agreed objectives and investment policy statement. Enhance also produce the analysis and reports for the Trustee Managed Portfolio Indices – A STEP Member Service that records investment manager peer group results.

Richard is a Fellow and holds the Personal Charter for the Chartered Institute for Securities & Investment and was President of the Jersey Branch of the CISI for 2 years. He has 20years' experience in the finance sector.

Richard has a practical understanding of portfolio and risk management, having been a discretionary portfolio manager, specialising in solutions for trustees whilst at Barclays Private Bank & Trust, Royal Bank of Canada and Matheson Securities. Richard is an Associate Member of the Chartered Institute of Arbitrators and is a Special Advisor for the STEP Private Client Awards.

He is a regular speaker on the subject of investment oversight and provides expert opinion for investment disputes.

Investment Oversight for Trustees

The presentation is highly topical following the enhancements to the Hong Kong Trustee Ordinance. Richard will consider what actually happens in practice including some recent case studies as well as making suggestions for the future.

- Review relevant requirements for trustees across jurisdictions
- Provide live examples through case studies

- Consider volatility risk and put currency risk into perspective
- Explain the benefits of a thorough Investment Policy Statement
- Summarise what makes for effective investment oversight and best practice

Those interested should register using the attached seminar enrolment form.

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SEMINAR ENROLMENT FORM

INVESTMENT OVERSIGHT

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The cost per person is HK\$300 for members of the HK Trustees' Association Ltd* and STEP, and HK\$400 for non-members. (*Any staff, not only the nominated representative of the HKTA member, can attend the seminar at a cost of \$300). Applications for ten or more members can enrol at a special discount fee of \$275 per person. Please complete this form and return it to us at the above address with your cheque made payable to **HK Trustees' Association Limited**.

Name of Member/Company _____

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 Association.
Bookings are only confirmed with payment, on a first-come, first-served basis)