

HK TRUSTEES' ASSOCIATION LTD
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A SHORT PRESENTATION ON
THE FAMILY OFFICE BUSINESS

Speakers: Ms Jane Yu
Dr Yumei Zhang (Jersey Finance)

Date: Wednesday, 24 February 2016

Time: 12 noon – 12.45 p.m.

Venue: The Offices of DLA Piper, 17/F Edinburgh Tower,
The Landmark, 15 Queen's Road, Central, Hong Kong

The China Development Sub-Committee (a joint sub-committee of the HK Trustees' Association and STEP Hong Kong **Branch**) will give a short presentation on the Family Office business and will cordially invite members to join the discussion.

Topics will include:

- There appears to be a notable explosion of the number of FOs in China since 2015, why do you think that was the case?
- What are the expectations of your clients?
- What are the challenges working for family offices servicing mainland Chinese clients?

Dr Yumei Zhang joined Jersey Finance in August 2014 as Business Development Director, Greater China, based in Hong Kong. Prior to Jersey Finance, Yumei was the managing director of Louvre Fiduciary (Hong Kong) Limited, a subsidiary of the Guernsey headquartered Louvre Group, a fiduciary and fund services provider. Yumei was instrumental in setting up and developing the Group's Hong Kong office.

Yumei's career has included academic teaching in UK universities, financial regulation at the Guernsey Financial Services Commission where she was a Senior Analyst in the Investment Business Division and most recently business development at the Louvre Group.

Ms Jane Yu has over 15 years of work experience in consulting and the finance industry. In late 2012, having worked in Credit Suisse and Morgan Stanley as a capital market specialist, Jane set up a multi-family office in Hong Kong servicing primarily mainland Chinese UHNW families.

She has just accepted the invitation from a client to run a single family office from January 2016 onward.

Jane graduated from the Fudan University with a Bachelor's degree in Economics and obtained her MBA from the Columbia Business School.

For those interested to join the discussion, please register using the attached seminar enrolment form.

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PRESENTATION ENROLMENT FORM

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There will not be any cost for attending this presentation and discussion session, but places are limited. In order to reserve your place, kindly complete this registration form and send it (by post or email) to:

The Hong Kong Trustees' Association Ltd
PO Box 8493
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Hong Kong

Attn: Ms Virginia Lam

Email: queries@hktrustees.com

Name of HKTA or STEP member: _____

Contact Person: _____ Telephone: _____

Email: _____

(Bookings will be confirmed on a first-come, first-served basis)