

HK TRUSTEES' ASSOCIATION LTD
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STEP HK LTD
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A SEMINAR ON
THE NEW TRUSTEE ORDINANCE

Speaker: Mr Bill Ahern (Family Capital Conservation Ltd)

Dates: (Wednesday, 11 September 2013 – already held)
(Thursday, 12 September 2013 – already held)
Wednesday, 25 September 2013
Thursday, 26 September 2013

Time: 6.00 p.m. – 7.00 p.m.

Venue: For 25 and 26 September: Intertrust Hong Kong, 38/F Central Plaza,
18 Harbour Road, Wanchai, Hong Kong

Bill Ahern has over twenty-five years' experience in Hong Kong and elsewhere in Asia in helping families deal with complex tax, succession and legacy issues. Bill established Family Capital Conservation Ltd (a Hong Kong company) in June 2008 to focus on providing independent and strategic advice to families and intermediaries in complex tax, succession and legacy planning. As Joint Chair of the Joint Committee on Trust Law Reform, Bill (along with many others) worked with the FSTB on the Trust Law (Amendment) Ordinance 2013 for over 7 years.

- 11 Sept 2013: - the Trustee Ordinance 1925 reprised, and the main amendments outlined.
- 12 Sept 2013: - the new statutory duty of care – how and what powers it applies to;
- new trustee's powers to insure and appoint agents, nominees and custodians;
- new trustee's duties and liabilities in relation to same;
- appointment and retirement of trustees.
- 25 Sept 2013: - **trustee's remuneration and expenses**; (carried forward from 12 September talk)
- statutory control of trustees' exemption clauses;
- reservation of trustee's investment powers to settlor;
- anti-forced heirship rules;
- 26 Sept 2013: - the Second Schedule and authorised investments;
- abolition of the RAP/REA;
- transitional and savings.
- **beneficiaries right to change trustees** (new topic)

Those interested should register using the attached seminar enrolment form.

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SEMINAR ENROLMENT FORM
THE NEW TRUSTEE ORDINANCE

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The cost per person is \$250 for members of the HK Trustees' Association Ltd* and STEP, and \$350 for non-members for each talk. (*Any staff, not only the nominated representative of the HKTA member, can attend the seminar at a cost of \$250). Applications for five or more members can enrol at a special discount fee of \$225 per person. For members attending all four talks, the cost will be \$900. The group discount (five or more members) will be \$850/person. Please complete this form and return it to us at PO Box 8486, GPO Hong Kong, with your cheque made payable to **STEP HK Ltd**.

Name of Member/Company _____

Attendee name	11 September 2013	12 September 2013	25 September 2013	26 September 2013

Cheque total: _____

Cheque No. _____

Contact Person: _____

Telephone: _____

Email: _____

(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)