



## HKICPA seminar: Family Office Services

Programme Code: S160808S

As Asian wealth management gains momentum, the demand for services to support the growth of wealth management in Asia will continue to rise. Will Asian families tap on the professional services offered by family offices to cope with their need for wealth creation, wealth preservation and wealth transfer to future generations? To what extent would these families let go of their tight reign and entrust their wealth planning to professionals such as those running family offices? What is a family office? What are the services of a family office and what is the typical profile of those working in a family office? Are they mainly investment managers? Accountants? Trustees? Lawyers? Bankers?

In this seminar, participants will understand:

- How Asian families typically create and preserve wealth
- The role, types and structure of a family office and relevant studies
- Family office constitution
- Single and multi-family office
- The role of an accountant in supporting families, family businesses and family offices

With the speaker's deep insights and decades of experience in Asian wealth management, he will highlight the principles, concepts and practical implications of running a family office for Asian families, and will let the participants understand why 'Fu Bu Guo San Dai (富不過三代)' can be rebutted with 'San Dai Tong Tang, Wu Shi Qi Chang (三代同堂、五世其昌)' (i.e. 3 generations under one roof, 5 generations of prosperity).

**Date** Monday, 8 August 2016

**Time** 7:00 p.m. – 8:30 p.m.

**Venue** Hong Kong Institute of CPAs,  
27/F., Wu Chung House, 213 Queen's Road East, Wanchai, Hong Kong

**Format** Seminar

**Language** English

**Fee** HKICPA member or student: HK\$190 (online enrolment: HK\$180)  
IA/ HKIAAT member or student: HK\$190  
Non-member: HK\$330

**Speaker** Mr. David Chong, Founder and President, the Portcullis Group

Mr. Chong is the Founder and President of the Portcullis Group. He is also the Executive Chairman of Fusang – the Asian Family Office, owned by his family. Fusang offers its services through Fusang Family Office Limited and Fusang Investment Office Pte. Ltd., which is a registered fund management company regulated by the Monetary Authority of Singapore. Mr. Chong is a director of David Chong Law Corporation, Singapore. He is also a director of Baxian Trust (Labuan) Limited, a licensed trust company authorised to provide trustee and corporate services in Labuan.

Mr. Chong qualified as a Barrister-at-Law, Lincoln's Inn; Advocate & Solicitor, Singapore, Malaya and Brunei; Barrister & Solicitor, British Virgin Islands; Solicitor, NSW and Queensland, Australia; Barrister & Solicitor, Australian Capital Territory and Victoria, Australia.

Mr. Chong is the President of the Singapore Trustees Association (STA). He served as the Founding President of Society of Trust & Estate Practitioners (STEP) Singapore Branch and was the Founding President of the Singapore Fund Administrators Association (SFAA). He is a Fellow of Harris Manchester College, University of Oxford. He has a Master's Degree in Law and a Master's Degree in Business.

**Participants** Persons who are interested in knowing family office services

**Competency\*** Industry knowledge

**Rating\*** Foundation level

**CPD hours** 1.5

\* Please refer to the [Institute's online CPD Learning Resource Centre](#) for descriptions of competency and rating.



**To confirm your CPD booking,  
 just log on to "My CPA" at  
<http://www.hkicpa.org.hk>**

**HKICPA Event Enrolment Form (For Support Programme)**

Finance & Operations Department,  
 Hong Kong Institute of CPAs,  
 37/F, Wu Chung House, 213 Queen's Road East, Hong Kong

**Please click here for online enrolment  
 (for HKICPA members only)**

Payment & Enrolment Status Enquiry: 2287 7381  
 e-mail: [finance@hkicpa.org.hk](mailto:finance@hkicpa.org.hk)  
 Fax : 2893 9853

Course Information Enquiry:  
 2287 7386 / 2287 7253  
 e-mail: [cpd@hkicpa.org.hk](mailto:cpd@hkicpa.org.hk)

**FOR OFFICE USE**

**Deadline: 7 working days before the date of the programme**

No.	Membership		Full Name of Participant(s) (Block Letters)	Company	Email address <sup>*(2)</sup> (Block Letters)	Programme Code	Fee (HK\$)	
	No.	Status (1)						
1								
2								
3								
4								
							Total (HK\$)	

\* **Email address is for enrolment confirmation purpose. Please refer to note (2) for details.**

I am unemployed and not working. I am planning to rejoin the workforce.  
 The Institute reserves the right to allocate places to enable the enjoyment of more members in this event.  
 The Institute's decision is final. Applicant must submit the enrolment form 10 working days before the event.

Contact Person : \_\_\_\_\_ Tel No. : \_\_\_\_\_ Fax No. : \_\_\_\_\_ E-mail : \_\_\_\_\_

**Payment Method** (Please tick the appropriate box)

Cheque (no. \_\_\_\_\_) payable to "Hong Kong Institute of Certified Public Accountants" or "HKICPA" <sup>(6)</sup>

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Card Number:																					Card Expiry Date (MM/YY):						
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I would like to have an official receipt. (Remarks: Official receipt will be sent to your email address provided above).

- Notes:**
- Membership Status: **NP** = Non-Practising, **P** = Practising, **IA** = International Affiliate, **S** = Student, **HKIAAT** = HKIAAT Student or Member, **GAA** = GAA Passport holder, **NM** = Non-Member.
  - Successful applicants will receive confirmation of registration by email at least 3 working days before the event. Unsuccessful applicants will also be notified around the same time. If you have not heard from the Institute regarding your registration 2 working days before the event and if you have other enquiries related to the programme, please make enquiry at 2287 7386 or 2287 7253.
  - NO ADMISSION TICKET will be issued. Please bring your HKICPA membership card or confirmation email for admission purpose.
  - All applications are on a first-come-first-served basis.
  - Application by fax will ONLY be accepted when payment is made by credit card. Cash is strictly not accepted. Please ensure all the particulars relating to payment are completed, otherwise the application cannot be processed. There is NO need to send in the enrolment form again if it has already been faxed to the Institute.
  - Please issue SEPARATE CHEQUE for each event.
  - NO REFUND/CANCELLATION will be entertained after the application is processed.
  - All scheduled events will be cancelled and postponed to a date to be announced in the event of typhoon signal no. 8 or above or if a Black Rainstorm warning is hoisted. For details of bad weather arrangement for CPD programmes, please refer to the Institute's homepage.
  - The Institute reserves the right to change the venue, date, speaker or to cancel the event due to unforeseen circumstances.
  - Your personal data collected from the enrolment process and administration of courses will be used for the purpose of the administration of the course on which you are enrolled. Such data collected may be accessible by the Institute's officers, persons or committees processing the application and related matters. In addition, the Institute may use the collected data for statistical research and analysis and, if applicable, for validation of CPD hours. The Institute intends to use the personal data of your name, email address and correspondence address to inform you, where relevant, of CPD activities, members' benefits, goods, services, facilities and events organized or provided by the Institute or other organizations. Members and registered students may opt out of receiving such materials at any time by logging in via the following link <https://www.hkicpa.org.hk/en/members-area/comm-preference/>. Non-members may opt out of receiving such materials at any time by sending an email to the Institute at [privacyofficer@hkicpa.org.hk](mailto:privacyofficer@hkicpa.org.hk) or a letter to the Institute's privacy officer. For more information about the privacy policy of the Institute, please go to <http://www.hkicpa.org.hk/en/service-tools/privacy-policy/>
  - No unauthorized audio or video recording is allowed at CPD events.

For payment by cheque, please fill-in your postal address for refund in case the event is full or cancelled.  
 (Remarks: For payment by credit card, refund will be made directly to your credit card.)

Name:	Name:
Address:	Address: