



Family Office: Value Added Service for CPAs?

Programme Code: S100526AS

Speaker	Dr. Sidney Sze , CEO, Midland Financial Group Dr. Sze is the Founder President of the Society of Registered Financial Planners, the Founder Chairman of Independent Financial Advisors Association Limited & Founder Chairman of Canadian NLP Academy. He is a member of the CPD Advisory Panel of the Institute. His latest books include: 《禪·語·易·學之快樂根源》、《全方位親子理財手冊》、《前藝·錢藝 為投資者把脈》、《擦亮投資眼》、《走出創富的迷思》、《財務策劃師專業考試 Q&A》 and Q& A for Financial Planning Professional Examinations. In October 2009, he spoke to 2,000 professional accountants in Kuala Lumpur, Malaysia on “Think Like a CEO – From Technical Excellence to Strategic Leadership Role”.
Date	Wednesday, 26 May 2010
Time	6:30 p.m. – 8:00 p.m.
Venue	Hong Kong Institute of CPAs Training Centre, 27/F., Wu Chung House, 213 Queen’s Road East, Wanchai, Hong Kong
Enrolment fee	HK\$190 for HKICPA member or student; and IA/HKIAAT’s member or student HK\$180 for online enrolment HK\$330 for non-member
Language	English
Format	Seminar
Competency	Leadership and Business Strategy*
Rating	Advanced Level* - Advanced understanding of the knowledge area. The ability to apply knowledge and skills to complex non-routine situations. Troubleshoot most situations in the absence of complete or consistent data/information.
Target audience	For those who are interested in providing wealth management services to clients
CPD credit	1.5 hours

About the programme

Family Office is for the rich. Chances are that if your client is a member of the ultra high net worth club, he probably owns a company or runs his own business. Since this would take a lot of his time, it would be virtually impossible for him to deal with all the different dimensions of wealth management, such as investment, risk control, taxes, charitable concerns, business planning, next generation issues and retirement planning, etc.

This is where the family office comes in handy. The family office is a private company structure that manages investments and trusts for a single wealthy family and works to create a tailor-made multi-dimensional strategic plan that addresses all the different aspects of wealth management for the family.

Do you want to play a role on this ultimate solution for sophisticated wealth management concerns?

* Please refer [here](#) for descriptions of other competencies and ratings.

HONG KONG INSTITUTE OF CERTIFIED PUBLIC ACCOUNTANTS

CPD ENROLMENT FORM (For Support Programme)

**To confirm your CPD booking,
just log on to "MyCPA" at
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Operation & Finance Department,
Hong Kong Institute of CPAs,
37/F, Wu Chung House, 213 Queen's Road East, Hong Kong

Please click here for online enrolment

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

Course Information Enquiry: 2287 7386
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Deadline: 7 working days before the date of the programme

No.	Membership		Full Name of Participant(s) (Block Letters)	Company	CT System ⁽²⁾	Programme Code	Fee (HK\$)	
	No.	Status ⁽¹⁾						
1								
2								
3								
4								
5								
							Total (HK\$)	

I am unemployed and 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)

<input type="checkbox"/> Cheque (payable to "Hong Kong Institute of Certified Public Accountants")																					
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<input type="checkbox"/> Visa / Master Credit Card	Card Number : <table border="1" style="display: inline-table; width: 150px; height: 15px;"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																				
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- 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.
 - Please put a "✓" in this column to indicate you wish to register by Computerized Ticketing System. Instead of a ticket you will receive a confirmation receipt by post. Details of the system can be found at <http://www.hkicpa.org.hk/membership/cpd/ticket.php>.
 - All applications are on a first-come-first-served basis. In the event of over-subscription, priority will be given to members and students of HKICPA.
 - Application by fax will ONLY be accepted when payment is made by Visa/Master credit card. 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.
 - Cheque(s) should be made payable to "Hong Kong Institute of Certified Public Accountants". Please issue SEPARATE CHEQUE for each event.
 - Successful applicants will receive admission ticket or confirmation notice (for those who opt for Computerised Ticketing System) 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 days before the event and if you have other enquiries related to the programme, please make enquiry at 2287 7386 or 2287 7253.
 - NO REFUND/CANCELLATION will be entertained after the application is processed. If you are unable to attend the enrolled programme, you may nominate a substitute to take your place, provided that the Institute is notified in writing at least two working days prior to the event date.
 - 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 or speaker of the event due to unforeseen circumstances.
 - All personal data collected from the enrolment process, and administration of the CPD Programmes will only be used for the purpose of the administration of the course on which members are enrolled.

Please fill in the following label CLEARLY for mailing of admission ticket:

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Company :	Company :
Address :	Address :