



創於1913年
Founded in 1913

香港華人會計師公會 The Society of Chinese Accountants & Auditors

(在香港註冊成立之有限公司)
(Incorporated in Hong Kong as a company limited by guarantee)

Family Office: Bridging Heirlooms and Horizon

Speaker: Dr. Zenki Kwan

21 May 2025 (Wednesday)

Course Code 1825



Family Office: Bridging Heirlooms and Horizon (Course Code 課程編號: 1825)

Highlights: 課程重點:

Family Office (FO) stands at the pinnacle of family and private wealth management business, and it's acclaimed as "the jewel in the crown". FO is becoming increasingly important to the entire financial services industry. In this 1-hour seminar, Dr. Kwan, as a seasoned Chief Investment Officer (CIO) for a Single Family Office and Adjunct Associate Professor at The University of Hong Kong, will share with the audience:

- 1) Overview of Family Office: Definition, Types, Governance Structures
- 2) The Competitive Edges of Hong Kong as a Hub for Family Office
- 3) Recent Development of Family Office in Hong Kong

* Light refreshments will be available for those attending in person. *

Speaker: 講者:



Dr. Zenki Kwan

Academic Advisor of HKU ICB Family Office Centre; Adjunct Associate Professor; Chief Investment Officer of a Single Family Office in Hong Kong; Veteran Investment Banker (J.P. Morgan, UBS)

Dr. Zenki Kwan is the CIO of a Single Family Office based in Hong Kong, spearheading the firm's investment strategy and chairing the Investment Committee. In his family office, Dr. Kwan is responsible for designing and implementing investment strategies across equities, fixed income, funds, and structured products for the family's multi-billion-dollar portfolio. Prior to his role as the CIO, Dr. Kwan was the vice-president of the private equity subsidiary covering the consumer sector in Finsoft Financial Investment Holdings (8018.HK), and spent his earlier career in McKinsey, Samsung Securities, UBS and J.P. Morgan from being a management consultant, equity researcher to corporate finance banker.



創於 1913 年
Founded in 1913

香港華人會計師公會 The Society of Chinese Accountants & Auditors

(在香港註冊成立之有限公司)
(Incorporated in Hong Kong as a company limited by guarantee)

Dr. Kwan is a highly qualified finance professional and educator. He holds a DBA from SBS Swiss Business School, Master's degrees in Finance (HKU) and Applied Business Research (SBS), and a First-Class Honours Bachelor's degree from HKUST. His certifications include FRM, CPA, CESA, CAIA, and CB, and he is also qualified as an independent non-executive director by the Shenzhen Stock Exchange. He is an adjunct professor at the University of South Australia Business School and Northumbria University. A published author and former columnist, he has received the Outstanding Teacher Award at HKU SPACE three times.

Chairman:
主持人：

Ms. Jenny Kun
SCAA Training Committee Chairlady
and Honorary Deputy Treasurer

Date:
日期：

21 May 2025 (Wednesday)
2025 年 5 月 21 日 (星期三)

Time:
時間：

6:30 pm – 7:30 pm
晚上 6:30 - 7:30

Format:
授課形式：

Hybrid seminar 混合形式研討會 (A/B)

A. Face-to-face seminar 實體研討會 (Limited seats available 座位有限)

SCAA Premises (6/F, 88 Lockhart Road, Wanchai, Hong Kong)
香港華人會計師公會 (香港灣仔駱克道 88 號 6 樓)

B. Webinar (Live via Zoom) 網路研討會 (Zoom 直播)

Language:
語言：

Cantonese
廣東話

CPD hours:
CPD 時數：

1 hour
1 小時

Fee:
費用：

HK\$100 for SCAA member/affiliate/member's staff; HK\$150 for non-member
華師正式會員/ 附屬會員/ 正式會員之僱員，每位 HK\$100; 非會員，每位 HK\$150

Enrolment:
報名：

A. If you would like to join the seminar through **physical mode**, please click [HERE](#) to enroll.

如欲參與**實體形式**研討會，請[按此](#)報名。

B. If you would like to join the seminar through **online mode**, please click [HERE](#) to enroll.

如欲參與**網絡形式**研討會，請[按此](#)報名。

*For participants paying by cheque, please be reminded to complete the online form and send it together with your cheque to the Secretariat. Enrolment will be processed upon receipt of the cheque.

**如選擇以支票形式付款，請完成網上表格連同支票寄回本會秘書處。報名將以收妥支票為準。



創於1913年
Founded in 1913

香港華人會計師公會 The Society of Chinese Accountants & Auditors

(在香港註冊成立之有限公司)
(Incorporated in Hong Kong as a company limited by guarantee)

Remarks:

備註:

The link to the Zoom webinar will be sent to registered participants via email prior to the webinar.

Zoom 研討會連結將於課程舉行前發送至參加者的登記電郵地址。

Enquiry:

查詢:

SCAA Secretariat

華師秘書處

T: 2869 6680

E: training@scaacpa.org.hk



Please follow us on:

歡迎關注我們：

