



2017 家族办公室高峰会

2017 FAMILY OFFICES SOLUTIONS SHOWCASE

2017 年 1 月 18-19 日
18-19 JAN 2017

香港德辅道中 21-23 号欧陆贸易中心 23 楼
23/F, Euro Trade Centre
21-23 Des Voeux Road Central

2017 Family Office Solutions Showcases
2017 家族办公室高峰论坛

DAY 1
第一天

0855 – 0900 Opening Speech 欢迎辞

Ms. Eva Law, Chairman, Association of Family Offices in Asia and Association of Private Bankers in Greater China Region
罗孟君女士, 亚洲家族办公室协会暨大中华地区私人银行家协会主席

0900 – 0945 Spotlight Interview 焦点访谈

Running Family Business - Asian Toy Industry Heavyweight Talks On Business Management and Succession

经营家族企业 — 亚洲玩具业先驱大谈企业管理与继承之道

Moderator 主持人:

Mr. Kevin Chan, Founder and Editor in Chief of BizHK, Chairman of Concern Group of Hong Kong Youth Entrepreneur Policy
陈家乐先生, BizHK 创业者志创办人兼总编辑、青年创业政策关注组主席

Interviewee 受访嘉宾:

Dr. Raymond Choy, Founder and Director of Toy2R (Holdings) Company Limited & Toy2R
蔡汉成博士, 玩具易(控股)有限公司及 Toy2R 玩具品牌创办人兼董事

0945 – 1015 Specialist Presentation 专家演讲

Family Wealth and Succession Planning Considerations

保障家族财富—设立家族办公室有什么决策?

Mr. John Wong, PwC China and Hong Kong Leader, Private Client Services
王志伟先生, 普华永道中国大陆及香港私人财富服务主管

1015 – 1130 Panel Discussion 专家研讨会

Single Family Offices Around the World - The Purpose of the SFO, the role of patriarchs in creating the office and crafting the early success of the family enterprises. How the next generation and family office executives help to sustain the legacy or long term success for the family.

世界各地的单一家族办公室 — 办公室创立的目的、父辈成员在建立办公室及奠定企业成功基础所扮演的角色、子辈成员与家办管理层该如何继往开来, 再创佳绩

Moderator 主持人:

Ms. Eva Law, Chairman, Association of Family Offices in Asia and Association of Private Bankers in Greater China Region
罗孟君女士, 亚洲家族办公室协会暨大中华地区私人银行家协会主席
Panelists 研讨专家:

Mr. Jim Wilkinson, President, Wilkinson Corporation LLC (US, Patriarch)
韦历晨先生, Wilkinson 公司总裁 (美国, 父辈成员)

Ms. Chingmy Lam, Founder & Chairman of Chingmie Group (North East Asia, Patriarch)

林玉卿女士, 香港齐德福集团 创办人 & 主席 (东北亚地区, 父辈成员)

Ms. Elaine Chow, Euro Properties, Executive Director (North East Asia, Next Gen)

周绮莲女士, Euro Properties 执行董事(东北亚地区, 子辈成员)

Mr. Dan Choon, Partner, Dyan S.a.r.l. (Europe, Next Gen)

Dan Choon 先生, Dyan S.a.r.l. 合伙人 (欧洲, 子辈成员)

Mr. Nadav Lehavy, Managing Director, Sandaire (UK, From SFO to MFO)

利赫伟先生, Sandaire 董事总经理 (英国, 从单一家办转投至联合家办)

Mr. Phil Kang, Former Investment Principal of Li & Fung & Manager of Merger Market (North East Asia, Family Business Corporate Executive)
姜毕求先生, 利丰集团前投资负责人& 并购市场高级经理 (东北亚地区, 家族企业管理层)

Mr. John Ng, Managing Director, Simon Murray & Co Limited (North East Asia, Family Office Executive)

吴任辉先生, 世铭集团董事总经理 (东北亚地区, 家办管理层)

Ms. Florence Yip, PwC Asia Pacific Tax Leader, Asset & Wealth Management (Asia, Professional in Family Office Service)

叶招桂芳女士, 普华永道亚太区资产及财富管理税务主管 (亚洲地区, 家办服务专家)

1130 – 1145 Networking Break 联谊时间

1145– 1215 Specialist Presentation 专家演讲

FATCA and Automatic Exchange of Information – How Family Vehicles can be impacted

海外帐户税收合规法案及自动资讯交换 — 家族办公室的控股公司如何受到影响

Ms. Angelica Kwan, Partner, US Tax, PwC
关宝仪女士, 普华永道会计师事务所美国税务合伙人

1215 - 1245 Specialist Presentation 专家演讲

The Five Dimension Model of Asian Succession 亚洲家族继承模式的五大面向

Dr. Amen Lee, President, Legacy Academy
李志诚博士, 传承学院院长

1245 – 1400 Lunch Break 午膳

1400 – 1445 Panel Discussion 专家研讨会

Multi-Generational Wealth Discussion – Implementing a Plan to Preserve, Grow and Give Away Wealth Over Generations 跨世代财富管理研讨会 — 实践家族财富增存与继承

Moderator 主持人:

Charles Scheyd, Principal & Independent Consultant serving Single Family Offices

薛察理先生, 单一家族办公室委托人及独立顾问

Panelists 受访专家:

Mr. John Wong, PwC China and Hong Kong Leader, Private Client Services
王志伟先生, 普华永道中国大陆及香港私人财富服务主管

Mr. Robin Zhang, Founding Partner, Venture Avenue

张红岩先生, 深德公益合伙创办人

Mr. Li Wei, Sr. Partner, Yingke Law Firm Family Trust Centre

李魏先生, 北京市盈科 (深圳) 律师事务所, 高级合伙人

Ms. Amy Zhang, Trust & Fiduciary Service Specialty Bureau

Member, Association of Private Bankers in Greater China

张旖妮女士, 大中华地区私人银行家协会信托服务专项事务专家组成员

Mr. Henry Tsai, Managing Director, Panhe Family Office

蔡季霖先生, 磐合家族办公室董事总经理

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**1445 – 1500 Speech by Family Business Next Generation Leader
家族企业新生代领袖演讲**

**Entrepreneurship and Bringing New Success To Family Business
创业精神与再创家族事业高峰**

Mr. Thomas Wong, Chairman, Arte Moda International Enterprises, China Global Group Holding Limited, Creative Alliance, Crowd-innovating Alliance Limited, Hong Kong Creative Lifestyle Brands Alliance, Belt and Road Youth Foundation Limited, Nanjing China Railway Best Joint Commercial Trading Co Ltd
王象志先生, 艺彩国际企业公司、中国环球集团控股、创意联盟、跨界众创联盟、香港创意时尚品牌联盟、一带一路青少年慈善基金、南京中铁佳联商贸主席

1500 – 1530 Interview with Family Office Executives (SFO) 家族办公室委托人专访

Alignment – How family office executive work with wealth owners and family members in achieving objectives of the family and building the family unity.

与家族结盟：家办管理层如何与富豪及家族成员一同协商，以达到家族的目标，并让家族成员团结一致。

Interviewer 主持人:

Ms. Eva Law, Chairman, Association of Family Offices in Asia and Association of Private Bankers in Greater China Region
罗孟君女士, 亚洲家族办公室协会暨大中华地区私人银行家协会主席

Interviewee 受访嘉宾:

Charles Scheyd, Principal & Independent Consultant serving Single Family Offices

薛察理先生, 单一家族办公室委托人及独立顾问

Mr. John Ng, Managing Director, Simon Murray & Co Limited

吴任辉先生, 世铭集团董事总经理

Ms. Anthonia Hui, CEO, AL Wealth Partners (Independent Advisor to SFOs)

许美茵女士, 铭盛理财合伙公司行政总裁 (单一家族办公室独立顾问)

**1530 – 1545 Interview with Family Office & Its Wealth Owner
家族办公室与富豪专访**

Interviewer 主持人:

Ms. Regina Qi, Vice Chairman, Association of Family Offices in Asia & Founder, Tsingfriend Family Office (HK) Co Ltd.

綦清芳女士, 亚洲家族办公室副主席、清友汇 (香港) 家族办公室有限公司创办人

Interviewee 受访嘉宾:

Mr. Lam Kwong Yu, Founder & Chairman, Starlite Holdings Limited
林光如先生, 星光集团有限公司创办人及主席

1545 – 1615 Networking Break 联谊时间

1615 – 1645 Opportunity Showcase 商机展示

Investment Outlook – Real Estate Market in United States

投资展望 – 美国房地产市场

Mr. Lonnie Gienger, CEO, Wilkinson Corporation LLC

纪恩哲先生, Wilkinson 行政总裁

Mr. George Waymire, Executive Vice President, Wilkinson Corporation LLC

韦迈尔先生, Wilkinson 执行副总裁

1645 – 1715 Opportunity Showcase 商机展示

Commercial Properties Market Opportunities Outlook in Europe

欧洲商用物业的市场商机展望

Mr. Jean-Francois Desjacques, CEO, Emotional Investments

狄家克先生, Emotional Investments 行政总裁

1715 – 1745 Specialist Presentation 专家演讲

What assistance does Chinese wealthy families truly need from professionals?

中国富裕家庭真正需要什么样的专业协助?

Ms. Jane Ren, Counsel of Shanghai Qin Li Law Firm, Shanghai
任文霞女士, 上海勤理律师事务所资深法律顾问

1745 – 1830 Panel Discussion 专家研讨会

Catalyzing Wealth For Change – Why & How leading families engage in impact investing? The many ways wealth owners & families can collaborate to make a better place.

以财富改变世界 – 富豪及家族实践社会责任投资的原因与途径、家族合作的社会影响力

Moderator 主持人:

Ms. Bowie Lam, Secretary General, Association of Private Bankers in Greater China Region and Council Member, Association of Family Offices in Asia

林美群女士, 大中华地区私人银行家协会秘书长、亚洲家族办公室理事会成员

Panelists 受访专家:

Ms. Mandy Zhang, Manager, Venture Avenue, Xihu-Yu Venture Philanthropy Fund

张祺女士, 深德公益「新湖育公益」创投基金经理

Ms. Elaine Chow, Executive Director, Nosipho Community Foundation

周绮莲女士, Nosipho 社区基金会执行董事

Ms. Nosipho Benedicta Ngcobo, Founder, Nosipho Community Foundation

伍戈普女士, Nosipho 社区基金会创办人

Ms. Chingmy Lam, Chairman of Chingmie Group

林玉卿女士, 香港齐德福集团主席

Mr. Jason Ma, CEO and Chief Mentor of ThreeEQ Inc., Speaker and Global Advisory Council Member at the World Chinese Economic Summit, Member of the B20 at the G20

马良杰先生, ThreeEQ 行政总裁及首席辅导顾问、世界华人经济峰会讲者及全球咨询委员会成员、二十国集团峰会 B20 成员

1830 – 1840 Networking Break 联谊时间

1840 – 1900 Signing Ceremony 签署仪式

Strategic Collaboration among

- Association of Family Offices in Asia
- Women In Leadership Association
- Shenzhen Council of the Promotion for Women's Startup
- Rose Academy of Finance

策略合作:

- 亚洲家族办公室协会
- 女性领袖协会
- 深圳市女性創業促進會
- 玫瑰金融学院

Launch of Female CEO Leadership Bootcamp

推出女性行政总裁领袖培训计划

Short speeches by All Organizations

所有组织的简短演讲

2017 Family Office Solutions Showcases
2017 家族办公室高峰论坛

DAY 2
第二天

0830 – 0835 Opening Remark 欢迎辞

Dr. Louis Poon, Executive Vice Chairman, Association of Family Offices in Asia & Association of Private Bankers in Greater China
潘乐鸣博士, 亚洲家族办公室协会暨大中华地区私人银行家协会行政副主席

0835 – 0905 Specialist Presentation 专家演讲
Asian Family Business and their Core Agenda
亚洲家族企业的核心关注议题

Dr. Peter Liao, President, Bluesource Family Office, Hong Kong Family Offices Association & China Family Business and Wealth Research Institute
廖文剑博士, 蓝源家族办公室董事长、香港家族办公室协会及会长

0905 – 0935 Specialist Presentation 专家演讲

Art collecting: Investments of passion come with rewards and risks.
How to well manage the risk?

艺术收藏: 珍品投资带来奖励和风险。如何很好地管理风险?
Mr. Richard Buckley, Vice Chairman, Sotheby
理查德巴克利先生, 苏富比副主席

0935 – 1005 Fireside Chat – Cultivating Young Leaders for Success
促膝长谈 – 培育成功的年青领袖

Interviewer 主持人:
Ms. Mandy Lau, Vice Chairman, Association of Family Offices in Asia & Asia Co-Investors Club
刘轩文女士, 亚洲联合投资者俱乐部, 亚洲家族办公室协会副主席
Interviewee 受访嘉宾:

Mr. Jason Ma, CEO & Chief Mentor, ThreeEQ Inc., Author of Young Leaders 3.0, Member of the B20 Employment and Education Taskforce at the G20
马良杰先生, ThreeEQ 行政总裁及首席辅导顾问、*Young Leaders 3.0* 作者、二十国集团峰会 B20 就业及教育工作小组成员

1005 – 1035 KEYNOTE Session 主题演讲环节

Impact of CRS on founders / key individuals of family office in China
共同汇报标准 (CRS) 对中国家族办公室创始人/关键人物的影响
Mr. Patrick Yip, Partner, Deloitte
叶伟文先生, 德勤会计师事务所合伙人

1035 - 1105 Specialist Presentation 专家演讲
The Emerging MFO Models In China - Sharing by Expert in China
中国新兴的联合家族办公室模式 - 中国大师分享
The Chinese Approach to Wealth Management in the New Era
新时代的中国式财富管理

Mr. Zhen Chen, President, Wanda Wealth Management
陈震先生, 万达财富总经理

1105 – 1115 Networking Session 联谊时间

1115 - 1145 Specialist Presentation 专家演讲
Leveraging Venture Capital in a Family Investment Portfolio: How Do FOs invest in VC?

在家族投资组合之中善用风险投资: 家族办公室如何进行风险投资?
Mr. Richard Ko, the Rep of Mr. David Drake – the Founder & Chairman, LDJ Capital
高理查德先生 代表 LDJ Capital 创始人及主席邓大卫先生

1145 - 1215 KEYNOTE Session 主题演讲环节
Project Investments by Family Office – the consideration encompassing the underlying commercial structure, the financial model, the financing process & the negotiation of lending terms
家族办公室项目投资 – 基础商业架构、理财模式、融资过程及协定贷款细则的全盘考虑

Dr. Danny Po, Asia-Pacific & China Mergers & Acquisitions Tax Leader, Deloitte
傅振煌博士, 德勤会计师事务所亚太区及中国企业并购重组税务服务主管

1215 – 1300 Panel Discussion 专家研讨会
Case Study : Co-investment and Direct Investment by AFO Members & Connectors

个案研究: 亚洲家族办公室联合投资者的共同与直接投资
Interviewer 主持人:

Ms. Lisa Li, Chief Editor and Publisher, Zenith Media
李飒女士, 臻传媒出版有限公司主编及出版人

Co-Investors 共同投资者:

Mr. Conrad Tsang, Founder and Chairman of Strategic Year Holdings Limited
曾光宇先生, 策年控股有限公司创始人及董事长

Mr. Nadav Lehavy, Managing Director, Sandaire
利赫伟先生, Sandaire 董事总经理

Ms. Jia-Lu Yin, Founder & Partner, Bright Minds Capital
殷佳璐女士, 博隽资本创始合伙人

Mr. Daniel Jim, Managing Director, Tripod Management Limited
詹博闻先生, 鼎基投资管理有限公司董事总经理

Ms. Mandy Lau, Vice Chairman, Asia Co-Investors Club
刘轩文女士, 亚洲联合投资者俱乐部及亚洲家族办公室协会副主席

1300 – 1400 Lunch Break 午膳

1400 – 1430 Specialist Presentation 专家演讲
How to Meet the Diversified Wealth Management Needs of Family Enterprises Owners

如何满足家族企业财富管理需求的多元化
Mr. Li Jian, Vice Chairman of Financial Strategy Committee of China Development Strategy Research Association
李健先生, 中国发展战略学研究会金融战略专业委员会副会长

1430 – 1500 Specialist Presentation 专家演讲
The risks facing the family office and its complexity 家族办公室面对的复杂危机

Mr. Olivier Lacoste, CEO, ENNEAS SARL
林奥理先生, ENNEAS SARL 行政总裁

1500 – 1545 Family Office Panel 家族办公室研讨会
Tycoons in Asia and their responses to key agendas facing the industry
亚洲实业家如何面对行业的核心关注议题

Interviewer 主持人:
Ms. Lynn Raebensamen, Head of Market Specialists, Bloomberg
李洁玲女士, 彭博市场专家部门主管

Tycoons 实业家:

Mr. Dan Choon, Partner, Dyan S.a.r.l. & Board Member, European Family Offices Alliance

Dan Choon 先生, Dyan S.a.r.l. 合伙人、European Family Offices Alliance 董事会成员

Ms. Chingmy Lam, Chairman of Chingmie Group
林玉卿女士, 香港齐德福集团主席

Mr. Lam Kwong Yu, Founder & Chairman, Starlite Holdings Limited
林光如先生, 星光集团有限公司创办人及主席

1545 – 1555 Networking Session 联谊时间

1555 – 1625 Good Will Session 慈善公益环节

How Family Offices can get involved with different forms of philanthropic work?

家族企业如何投身各类慈善事业?

Mr. Robin Zhang, Founding Partner, Venture Avenue
张红岩先生, 深德公益合伙创办人

1625 – 1655 Technology & Innovation Panel 科技创新研讨会
The Evolution of Technology Solution & Specialized Services For Supporting Families

支援家族办公室发展的科技创新方案及专业服务

Moderator & Interpreter 主持人及翻译:

Mr. Peng Wan, Chief of Creative Research Department, Shenzhen Financial Innovation Research Association; Marketing Director of Internet Department, Asia-Pacific Property and Casualty Insurance, Doctoral Tutor of Department of Insurance, Renmin University of China
万鹏先生, 深圳金融创新研究会首席研究员及创新研究部部长、亚太财险互联网部市场总监、中国人民大学保险系博导

Dr. Louis Poon, Executive Vice Chairman, Association of Family Offices in Asia 潘乐鸣博士, 亚洲家族办公室协会行政副主席
Panelists 研讨专家:

Ms. Anna Stephenson, CEO, Inflection Point Solutions Limited
薛凤燊女士, Inflection Point Solutions 有限公司行政总裁

Mr. Chris Chan, Specialist Consultant, Titto & Jacobs

Chris Chan 先生, Titto & Jacobs 专家顾问

Mr. Haysen Yick, Regional Senior Representative, Suisse TechPartners

Haysen Yick 先生, Suisse TechPartners 地区管理层代表

1655 – 1725 Fireside Chat: The Recent Investment Focus of Family Office – Technology Investment

促膝长谈: 家族办公室的最新投资焦点 – 科技投资

Interviewer 主持人:

Mr. Henry Lee, Vice Chairman, Association of Family Offices in Asia
李谦伟先生, 亚洲家族办公室协会副主席

Interviewee 受访嘉宾:

Mr. Fred Wong, CIO, eFusion Capital

王华先生, 易方资本投资总监

1725 – 1755 Opportunity Showcase 商机展示

Future Home For Wealthy Family – Being Eco-friendly & Application of AI

富豪家族的未来居所 – 融合环保与人工智能

Mr. Ip Wai Shan, President & Founder Association of Smart Living International
叶伟山先生, 国际智能生活协会会长及创始人

1755 – 1800 Closing Remark & Group Photos 闭幕辞&团体照

Ms. Eva Law, Chairman, Association of Family Offices in Asia and Association of Private Bankers in Greater China Region
罗孟君女士亚洲家族办公室协会, 大中华地区私人银行家协会主席

1800 – 2000 Family Offices & Outstanding Industry Practitioners Awards Announcement Cocktail 2017

家族办公室及出色从业员奖项揭幕酒会 2017

1800 Awards Program Announcement 公布奖项计划细节

1845 – 2000 Networking Drink Session 联谊时间

Organizers 主办单位:



Supporting Organizations 支持机构:

Bloomberg 彭博

European Family Offices Alliance

Legacy Academy 传承学院

Manqian 慢钱

Preqin

Palico

Singapore Private Wealth Association

Terrapinn

ThreeEQ

Shenzhen Council of the Promotion for Women's

Startup 深圳市女性创业促进会

Media Partners 媒体合作伙伴:

Asia Newsweek 《亚洲新闻周刊》

Asian Investor 《亚洲投资者》杂志

Asian Private Banker 《亚洲私人银行家》杂志

BizHK 创业人志

China Family Business Review 《家族企业》杂志

Family Office Elite Magazine

Family Office Insights

HURUN REPORT 胡润百富

MillionaireAsia

Private Banking International

Retail Banking Magazine

The Moment Magazine 《投资先机》财经月刊

WE TV Program 《我们》电视节目

WealthBriefing & Family Wealth Report

Zenith Media 臻杂志

www.familyoffices-conference.com

www.familyoffices-awards.com

www.familyoffices-asia.org

www.private-bankers.net

Family Offices & Outstanding Industry Practitioners Awards

家族办公室及出色从业员奖项

Awards Presentation & Gala Event

颁奖典礼和宴会

9 June 2017

2017年6月9日

Enquiry 查询: +852 3499 3851 / +852 9279 8529

Key Contact 主要联系人:

Ms. Cindy Ng 吴秀嫻女士 sponsorship@familyoffices-awards.com

Ms. Eva Law 罗孟君女士 evalaw@familyoffices-asia.org

Mr. Clement Cheung 張雋榮先生 admin@private-bankers.net

Conference material (speakers' presentation, video and pictures) will be uploaded by phases on www.familyoffices-conference.com
会议资料(发言人的演讲, 视频和图片)将分阶段上传到 www.familyoffices-conference.com