



THE ASSOCIATION OF  
**HONG KONG**  
**ACCOUNTANTS**  
香港會計師專業協會

*(a member of The Association of Hong Kong Accountants Limited,  
incorporated in Hong Kong as a company limited by guarantee)*

Unit E6, 2/F., Hong Kong  
Industrial Building,  
444-452 Des Voeux Road West,  
Hong Kong  
Tel: (852) 3520 2546  
Fax: (852) 3547 8088  
Email: [ahka\\_enrolment@ahka.hk](mailto:ahka_enrolment@ahka.hk)  
Website: [www.ahka.hk](http://www.ahka.hk)

**AHKA Spring Social Event & Sharing**  
**“Update of Family Office Regulations & Market Trend”**

**Speaker:**

**Mr. Clement Siu**

Deputy Managing Partner  
Global Vision CPA Limited

**Moderator:**

**Mr. Eugene Liu**

Past President of AHKA

**Panelist Members:**

**Mr. Fredric Leung**

Visiting Lecturer at The Institute for China Business of The University of Hong Kong  
Executive Director of Raffles Family Office

**Mr. Allan Lee**

Vice President (Professional Training and Governance)  
Head, Family Governance Center  
Legacy Academy

**(Course Code : 042025)**

**Highlight:**

1. What is single family office
2. Structure of family office under IRD Hong Kong
3. Requirements to obtain tax exemption from IRD
4. Highlight family trust
5. Capital Investment Entrant Scheme (“CIES”) 2025

**Venue Sponsor & Supporting Organization:**



**Supporting Organizations:**





THE ASSOCIATION OF  
**HONG KONG**  
**ACCOUNTANTS**  
香港會計師專業協會

(a member of The Association of Hong Kong Accountants Limited,  
incorporated in Hong Kong as a company limited by guarantee)

Unit E6, 2/F., Hong Kong  
Industrial Building,  
444-452 Des Voeux Road West,  
Hong Kong  
Tel: (852) 3520 2546  
Fax: (852) 3547 8088  
Email: [ahka\\_enrolment@ahka.hk](mailto:ahka_enrolment@ahka.hk)  
Website: [www.ahka.hk](http://www.ahka.hk)

<b>Date:</b>	<b>11 March 2025 (Tuesday)</b>	
<b>Time:</b>	6:30pm – 8:00pm (6:15pm Registration)	
<b>Venue:</b>	<b>Raffles Family Office - 32/F., The Center, 99 Queen's Road Central, Hong Kong</b>	
<b>Medium:</b>	Cantonese	
<b>CPD Hours:</b>	1.5 hours	
<b>Enrolment Fee:</b>	<b>HK\$150</b>	Member of AHKA
	<b>HK\$150</b>	Staff / Member of Supporting Organizations
	<b>HK\$250</b>	Non-member or Others
<b>Online Enrolment:</b>	Please <a href="#">Click Here</a>	
<b>Remarks:</b>	<b>1. Because the venue is a lounge with standees setting, seating arrangement would not be available. We appreciate your understanding.</b> <b>2. Light refreshments will be provided</b>	
<b>Deadline:</b>	7 March 2025 (Friday)	

#### **About the Speaker:-**



**Mr. Clement Siu**  
**Deputy Managing Partner**  
**Global Vision CPA Limited**

Mr. SIU is the Deputy Managing Partner at Global Vision CPA Limited, bringing over 25 years of experience in the accounting and auditing industry. He has held significant positions as Chief Accountant and Executive Manager in listed companies on the Hong Kong stock exchange and multinational corporations. Currently, his practice focuses on statutory audits for non-listed multinational companies and local small to medium-sized enterprises (SMEs). He provides comprehensive services to clients that are not solely family offices, assisting with group structures and tax planning, which includes the establishment of both local and overseas companies.

In addition to his auditing work, Mr. SIU also serves as a liquidator, offering advice on restructuring and bankruptcy management for companies facing financial difficulties. His extensive expertise allows him to guide clients through complex financial challenges, ensuring they receive tailored solutions to meet their specific needs. Mr. SIU's commitment to professionalism and his in-depth understanding of the industry make him a valuable asset to his clients and the broader business community.

In addition, Mr. Siu is well-versed in the operations of Cayman Islands funds and can effectively assist clients with their annual statutory audits to ensure compliance with CIMA regulations.



THE ASSOCIATION OF  
**HONG KONG**  
**ACCOUNTANTS**  
香港會計師專業協會

*(a member of The Association of Hong Kong Accountants Limited,  
incorporated in Hong Kong as a company limited by guarantee)*

Unit E6, 2/F., Hong Kong  
Industrial Building,  
444-452 Des Voeux Road West,  
Hong Kong  
Tel: (852) 3520 2546  
Fax: (852) 3547 8088  
Email: [ahka\\_enrolment@ahka.hk](mailto:ahka_enrolment@ahka.hk)  
Website: [www.ahka.hk](http://www.ahka.hk)

### **About the Panelist Members:-**



#### **Mr. Fredric Leung**

**Visiting Lecturer at The Institute for China Business of The University of Hong Kong**

**Executive Director of Raffles Family Office**

**Director of The Tsinghua University Education Foundation (HKSAR) Limited**

**Vice Chairman, Committee of Family Office The Institute of Certified Management Accountants**

Mr. Fredric Leung earned his Bachelor of Business Administration and Bachelor of Chinese Medicine degrees from the University of Oregon and the University of Hong Kong, respectively, followed by a MSc in Financial Engineering from City University of Hong Kong.

Mr. Leung began his professional career at Jardine Fleming in the 1990s, focusing on unit trust investments and fund administration. Since then, he has held significant roles at HSBC Private Banking, UBS, ING/BOS, and BNP Paribas, providing expert consultancy to ultra-high-net-worth families.

Throughout his career, Mr. Leung has collaborated with ultra-high-net-worth families, affluent individuals, and executives worldwide, assisting them in developing private wealth management and investment strategies. He has also worked extensively with family enterprises in the Asia-Pacific region, addressing issues related to corporate governance and intergenerational wealth succession.

Mr. Leung primarily focuses on delivering professional planning for affluent families in wealth management and succession planning. He frequently speaks on family office topics at major institutions and various forums in Hong Kong and Mainland China, making significant contributions to the advancement of family office practices in Asia.

Mr. Leung is currently affiliated with Raffles Family Office, assisting clients in setting up family offices in Singapore and Hong Kong. His outstanding contributions in this role have resulted in his appointment as Director of the Tsing Hua University Education Foundation (HKSAR) and Vice Chairman of the Family Office Committee under the Certified Management Accountants (CMA) of Australia. He is committed to advancing the evolution of global education developments and deepening members' understanding of family enterprise management culture.



THE ASSOCIATION OF  
**HONG KONG**  
**ACCOUNTANTS**  
香港會計師專業協會

*(a member of The Association of Hong Kong Accountants Limited,  
incorporated in Hong Kong as a company limited by guarantee)*

Unit E6, 2/F., Hong Kong  
Industrial Building,  
444-452 Des Voeux Road West,  
Hong Kong  
Tel: (852) 3520 2546  
Fax: (852) 3547 8088  
Email: [ahka\\_enrolment@ahka.hk](mailto:ahka_enrolment@ahka.hk)  
Website: [www.ahka.hk](http://www.ahka.hk)

### **About the Panelist Members:-**



#### **Mr. Allan Lee**

**Vice President (Professional Training and Governance)**

**Head, Family Governance Center**

**Legacy Academy**

Mr. Allan Lee is the Vice President (Professional Training and Governance) and the Head of the Family Governance Center of Legacy Academy. He is a Master Family Legacy Planner who is responsible for family legacy consultancy and training services. He specialises in family governance and research on success factors of Japanese enterprises with longevity. He is a legacy book writer and was the RTHK CIBS program host for the Program “Uprising Second Generations”.

Mr. Lee is also the Executive Vice President of the Institute of Management Consultants Hong Kong (IMCHK) and the Chairperson of the Family Office Subcommittee of IMCHK. He is a Certified Management Consultant (CMC), trained in ISO20700:2017 “Guidelines for Management Consultancy Services” by CMC-Global.

Mr. Lee is the Honorary Research Associate at the Chinese Family Succession Research Center of The Hang Seng University of Hong Kong. He was a guest speaker for the Family Business Innovation and Succession of the EMBA Master Class in 2022. He was also the Visiting Lecturer (part-time) at the College of Professional and Continuing Education of the Hong Kong Polytechnic University and the Visiting Lecturer at the Institute for Entrepreneurship of the Hong Kong Polytechnic University, teaching the Family Legacy Facilitator course.

## Enrolment Form

To : The Association of Hong Kong Accountants

Email : [ahka\\_enrolment@ahka.hk](mailto:ahka_enrolment@ahka.hk)

Enquiries : 3520 2546

Fax : 3547 8088

**AHKA Spring Social Event & Sharing**  
**“Update of Family Office Regulations & Market Trend”**  
**Course Code: 042025**  
**11 March 2025 (Tuesday)**

Member of AHKA (No.: \_\_\_\_\_)

Staff / Member of Supporting Organizations

Non-Member or Others

Full Name : \_\_\_\_\_

Firm's Name : \_\_\_\_\_

Mobile Phone No. : \_\_\_\_\_ Email: \_\_\_\_\_

<b>Enrolment Fee:</b>	Member of AHKA	HK\$150
	Staff / Member of Supporting Organizations	HK\$150
	Non-Member or Others	HK\$250

Cheque No. : \_\_\_\_\_ Bank: \_\_\_\_\_ Amount HK\$ \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Please complete the enrolment form together with your cheque for the full amount made payable to “**The Association of Hong Kong Accountants Limited**” and send to Unit E6, 2/F., Hong Kong Industrial Building, 444-452 Des Voeux Road West, Hong Kong

Notes:

- Enrolments for the event are accepted on the first-come-first-served basis. Priority will be given to AHKA's members or associates and staffs / members of Supporting Organizations.
- Confirmation will be sent by email one or two day before the date of the event.**
- If Typhoon Signal No. 8 or higher / Black Rainstorm warning is hoisted, the event will be postponed, and new arrangement will be announced.
- Personal data** collected from the enrollee may be used by the Association to inform you of this event, and any other training activities, the benefits, goods, services, facilities and events to be organized or provided by the Association. An enrollee may opt out from receiving such materials at any time by sending a letter to the Association's privacy officer.
- Once application is successful, fees are non-refundable and seats are non-transferable.**