Dealing with wealth accumulation strategies for clients in Hong Kong normally adds an extra degree of complexity as people 'touch' countries, jurisdictions and tax authorities without thinking about the long term consequences for themselves and their families. Far too often clients' estates are pulled apart post death either through family feuds, impact of taxes, third party claims or just pure complexity of administration.

Effective estate and continuity planning strategies that deal with ensuring the right people at the right time benefit from a client's assets/estate is a core requirement of financial and wealth management. Benefits include:

- Avoid the cost and time of lengthy probate procedures
- Reduce potential tax impacts
- Avoid and protect a surviving family's interests
- Direct assets to the place a person wants them to go to
- Keep creditors at bay
- Protect oneself who is unable to look after his own financial affairs due to incapacity

In this seminar, the speaker will cover:

- Events and connections that create problems for estate and continuity planning
- Impacts of these problems on a person's asset base including the assets of a family business
- Strategies that can provide enhanced certainty of estate protection and transfer

**Date**  
Thursday, 5 May 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 for HKICPA member: HK$180)  
IA/ HKIAAT member or student: HK$190  
Non-member: HK$330

**Speaker**  
Mr. Mark Rawson, Chief Executive Officer, St. James's Place (Hong Kong) Limited

Mr. Rawson is the Chief Executive Officer of St. James's Place Wealth Management's office in Hong Kong. St. James's Place is a FTSE 100 company specializing in assisting private clients in wealth management and has over £6 billion of private client monies under management.

Mr. Rawson has lived in Hong Kong for almost twenty years and specializes in helping private clients and small and medium sized entities ("SME") to manage their wealth, protect their families' assets and organize their affairs. He is a very established speaker and commentator in the market.

**Participants**  
Practitioners dealing with SME, family run businesses, or private clients tax affairs

**Competency**  
Risk management; 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.
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

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

Course Information Enquiry:
2287 7386 / 2287 7253
E-mail: cpd@hkicpa.org.hk

Deadline: 7 working days before the date of the programme

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<th>No.</th>
<th>Membership Status</th>
<th>Full Name of Participant(s) (Block Letters)</th>
<th>Company</th>
<th>Email address *(2)</th>
<th>Programme Code</th>
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*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” *(6)

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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:
1. Membership Status: NP = Non-Practising, P = Practising, IA = International Affiliate, S = Student, HKIAAT = HKIAAT Student or Member, GAA = GAA Passport holder, NM = Non-Member.
2. 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.
3. NO ADMISSION TICKET will be issued. Please bring your HKICPA membership card or confirmation email for admission purpose.
4. All applications are on a first-come-first-served basis.
5. 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.
6. Please issue SEPARATE CHEQUE for each event.
7. NO REFUND/CANCELLATION will be entertained after the application is processed.
8. 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.
9. The Institute reserves the right to change the venue, date, speaker or to cancel the event due to unforeseen circumstances.
10. 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 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].
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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.)

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To confirm your CPD booking, just log on to “My CPA” at [http://www.hkicpa.org.hk](http://www.hkicpa.org.hk)

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