

A HOLISTIC APPROACH TO WOMEN'S FINANCIAL EMPOWERMENT

Women create, control and influence a vast amount of wealth worldwide. At the same time, powerful demographic, economic, legal and technological changes are increasing the complexity of wealth planning.

Perhaps the largest increase in female wealth will come from inheritance and wealth transfers. But no matter whether women are creators or (potential) beneficiaries of wealth, whether they are career women or not, everyone has questions regarding the protection and succession of family assets. The perspective may be that of a mother, daughter, sister, granddaughter or that of a life partner, but there are common themes threading through all these different roles. It is estimated that 95% of women will be their family's primary financial decision-maker at some point in their lives, yet many are ill-prepared to give or receive wealth. Research shows that beneficiaries are generally not only unprepared but uninformed and unsupported. In a recent survey, only 29% of women had received guidance from benefactors on how to manage inherited assets, compared with 37% of men.

There has been precious little emphasis on education focused on wealth planning specifically designed for women. In this day and age, as the world seems an increasingly uncertain place and financial, social and familial models are changing dramatically, it is more critical than ever to understand how best to navigate the financial landscape.

WHAT?

This is a one-day seminar developed specifically for women by three prominent practitioners in the fields of family law, tax and trust law and investment management.

To date, seminars of this nature have generally been offered by financial institutions such as banks and accounting firms seeking to introduce their in-house services. We view our offering as an independent exercise more aligned with training and education. This event will be the first of its kind, and we are proud to present it in Hong Kong.

The seminar will explore different scenarios which may develop during one's lifetime and the effect these may have on both one's wealth as well as one's relationships. In particular, it will address the issues of wealth planning and protection from a female perspective and will look at how to plan appropriately and in a timely manner for life's uncertainties.

The format will be one of an engaging case study focusing on an extended fictional family and addressing issues such as adultery, dementia, greed, heredity and gender politics.

Topics will include:

- Asset types, protection and preservation;
- Multi-jurisdictional residences/citizenships;
- Understanding the wealth management industry and choosing an advisor;
- Forms of wealth and holdings: Foundations, Trusts and the like;
- Pre- and post-marital planning;
- Wills, succession and probate;

- Managing the risks of divorce;
- Community property;
- Women and cultural issues;
- Changing demographics;
- Protecting the interests of children.

By attending this seminar, we hope that it will help you to:

- Understand what you need to know about wealth in your family and those succession and asset protection issues particularly important for women;
- Understand how wills, trusts and other succession vehicles work;
- Understand how divorce and other changes in relationships affect your rights and how to ensure that those rights are preserved;
- Understand the documents and reports that banks and other asset managers provide so that you can ask the right questions and ensure proper oversight over those who provide wealth management services;
- Raise questions in a safe environment.

WHO?

Whether you are a career woman or not, have wealth or not, have some or little financial knowledge, this seminar aims to introduce topics that will broaden your understanding of not only the world of finance in general but also deepen your knowledge of the tools available to better prepare for the future. Financial empowerment can begin at any age.

This event is offered for women attendees only.

HOW?

The seminar will be held in discussion form with the panel of experts as presented below. An extended Q & A will be held after the discussion. The number of places will be kept deliberately small so as to encourage active exchange and engagement.

OUR SEMINAR FACILITATORS

Thelma Kwan is a practicing Barrister specializing in trust, probate and family law in Hong Kong.



Before returning to private practice in 2014, Thelma spent more than 20 years in the trust and wealth planning segment of various private banks. Her last role saw her as the Head of Wealth Advisory for Asia Pacific for an international private bank.

Thelma was on the International Financial Centre Power Women Top 100, and was named in the “Leading Trustee” category in the Citywealth Leaders List in 2013, and is on the Private Client Global Elite List in 2018.

Thelma co-authored the book “Drafting Trusts and Will Trusts in Hong Kong,” published in January 2016. In addition to litigation work, Thelma teaches and speaks at international conferences; she also engages in advising

clients on non-contentious succession matters, writes wills, drafts trust agreements and liaises with international advisers to give clients holistic wealth planning advice.

Thelma is born, bred, and educated in Hong Kong. She has served as a Director to The Women's Foundation, a local charity helping women and girls in HK, and is now one of their Honorary Trustees; and she is a Founding Member of MIP Care Resources Connect Limited.

Amaury Jordan is founding partner of a leading Swiss wealth manager working with private clients and families.

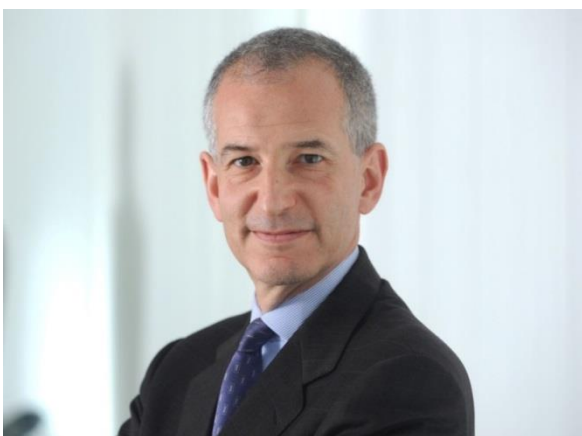


Prior to founding Avalor in 2005, Amaury spent twenty years in the investment industry, first on Wall Street, later in Zurich where he worked for one of Switzerland's foremost private banks.

Amaury obtained his CFA Charter in 1990, was founding President and former Board member of the Swiss CFA Society as well as a former Board member of the CFA Institute. Today, Amaury sits on the Boards of the Alliance of Swiss Wealth Managers (ASV-ASWM) and the Swiss Youth Hostels (SJH). His firm last year launched a project with an international school near Zurich whereby Avalor conducts interactive workshops for 11th and 12th graders on the principles of investing.

A Swiss national, Amaury was raised in Munich, Strasburg, Sydney, Prague, Montreal and New Delhi, before completing his studies in Paris and Boston. He is a graduate of the American University of Paris (summa cum laude) and the Fletcher School of Law and Diplomacy.

Philip Marcovici consults with governments, financial institutions and global families in relation to tax, wealth management and other matters. He sits on the boards of several entities within the wealth management industry, as well as of entities within family succession and philanthropic structures.



Philip teaches in the areas of taxation, wealth management and family governance. Among other roles, he is a member of the Advisory Committee of the Hong Kong University of Science and Technology's Tanoto Center for Asian Family Business and Entrepreneurship Studies as well as Founding Advisor to the Responsible Family Business and Wealth Ownership program created by Cambridge Judge Business School Executive Education.

Philip was a partner of global law firm Baker McKenzie, and practiced in the area of international taxation throughout a legal career spanning over 35 years. Based first in

Hong Kong and later in Zurich, Philip has also practiced law in each of New York and Vancouver, British Columbia. While still a partner of Baker McKenzie, Philip founded and was CEO of LawInContext (now known as Baker McKenzie Link), the interactive knowledge venture of Baker McKenzie.

Philip is a graduate of Harvard Law School and the law school of the University of Ottawa. He is admitted to practice in New York, England and Wales, Hong Kong and British Columbia, Canada (retired). He is the author of "The Destructive Power of Family Wealth," published by John Wiley & Sons in 2016.

WHEN?

The seminar will run from 10 am - 5 pm on Thursday, November 28, 2019, with coffee and registration from 09:30am.

WHERE?

The seminar will be held in the Regatta Room of the Royal Hong Kong Yacht Club (Kellett Island), Causeway Bay, Hong Kong.

HOW MUCH?

The cost of attending the seminar will be HK\$3'999 per person. The day will include lunch and two refreshment breaks. Payments will be non-refundable (unless the event is canceled) but transferable.

SPECIAL DEALS

Attendees registering before August 31st will enjoy a 20% discount, for a cost of only HK\$3'199 per person.

For every group of four, one participant will enjoy free entry.

WHAT ELSE DO I NEED TO KNOW?

Please use the registration form enclosed.

For further information, please contact:

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