



## HKICPA seminar: Business and Family Succession

Programme Code: S150721S

In Hong Kong, many founders of family businesses have reached their age of retirement and their families have to face the difficulties of business and family succession. In the meantime, the succession issues have also offered valuable business opportunities to different stakeholders including professional accountants, lawyers, trustees, private bankers and financial planners etc.

In the past, the founders, their family members and senior management of the family business may tend to focus on the relevant legal and financial issues of succession management. However, in order to protect the interest of the founders' families and businesses in the long run, it is equally important to consider the value, relationship and ethics of family legacy during the planning, implementation and monitoring of the succession process.

In this seminar, the speakers will first talk about the important elements and best practices of succession management as well as cover the concept of family business governance. They will also explain how the Holistic Wealth Family Legacy Five-Dimension Model (including (i) family value consensus, (ii) family relationship sustainability, (iii) family knowledge transformation, (iv) family wealth management and (v) family enterprise succession) can create positive value to the succession management. Real-life case studies will also be shared with the participants in the seminar.

<b>Date</b>	<b>Tuesday, 21 July 2015</b>
<b>Time</b>	<b>6:30 p.m. – 9:30 p.m.</b>
<b>Venue</b>	Hong Kong Institute of CPAs, 27/F., Wu Chung House, 213 Queen's Road East, Wanchai, Hong Kong.
<b>Format</b>	Seminar
<b>Language</b>	Cantonese
<b>Fee</b>	HK\$430 for HKICPA member or student; and IA/ HKIAAT member or student HK\$420 for online enrolment HK\$700 for non-member
<b>Objectives</b>	<ul style="list-style-type: none"><li>• Recognize the importance of value, relationship and ethics for family legacy</li><li>• Understand the key elements and best practices for successful business and family succession</li><li>• Realize the importance of family business governance on business and family succession</li><li>• Understand the value of the Holistic Wealth Family Legacy Five-Dimensional Model on business and family succession</li></ul>
<b>Speakers</b>	<p><b>Dr. Michael Chan</b>, Honorary Chairman, Legacy Academy Dr. Chan is also the Chairman of Café de Coral group. He is a frequent speaker on family legacy and sustainable business succession through sharing his expertise and experience.</p> <p><b>Dr. Amen Lee</b>, President, Legacy Academy Dr. Lee is an expert on family legacy and business succession. He is also a column writer in newspapers and magazines and book author on related topics. He aims at helping family and business on trans-generational succession.</p> <p><b>Mr. Allan Lee</b>, Director of Training, Legacy Academy Mr. Lee is a Family Legacy Planner and a member of the Hong Kong Institute of CPAs. He has acquired more than 15 years of extensive training experience. He aims at establishing family business governance system for family enterprises.</p>
<b>Participants</b>	Accountants, lawyers, trustees, private bankers, financial planners and management of family businesses
<b>Competency</b>	Corporate governance
<b>Rating</b>	Foundation to Intermediate Level (Please refer to the <a href="#">Institute's online CPD Learning Resource Centre</a> )
<b>CPD hours</b>	3



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Finance & Operations Department,  
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**Deadline: 7 working days before the date of the programme**

No.	Membership		Full Name of Participant(s) (Block Letters)	Company	Email address <sup>*(2)</sup> (Block Letters)	Programme Code	Fee (HK\$)	
	No.	Status (1)						
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2								
3								
4								
<b>* Email address is for enrolment confirmation purpose. Please refer to note (2) for details.</b>							Total (HK\$)	

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 : \_\_\_\_\_

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- Notes:**
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  - 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.
  - NO ADMISSION TICKET will be issued. Please bring your HKICPA membership card or confirmation email for admission purpose.
  - All applications are on a first-come-first-served basis.
  - 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.
  - Please issue SEPARATE CHEQUE for each event.
  - NO REFUND/CANCELLATION will be entertained after the application is processed.
  - 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.
  - The Institute reserves the right to change the venue, date, speaker or to cancel the event due to unforeseen circumstances.
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