

Will, Trust, Family Office and Succession Planning

by
Ms Winnie Chiu,
Partner,
Yang & Yang Solicitors LLP
and
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Senior Advisor, Deloitte



Winnie Chiu has extensive experience in Succession Planning, Will, Trust and Probate related matters. She also handles disputes between beneficiaries; beneficiaries and the executor/administrator/trustee.



Winnie is a frequent speaker at seminars in Hong Kong, PRC and overseas in relation to succession planning for trustee companies, bankers, investment advisors, accountants, lawyers and high net worth individuals.

Winnie also has solid experience in handling contentious and non-contentious employment matters as well as anti-discriminations, sexual harassment and personal data privacy related issues arising from recruitment, merger & acquisition, restructuring and/or post-termination restrictive covenants. She regularly conducts seminars and training sessions for HR directors, professionals and management of international companies.

Prior to joining Yang & Yang, Solicitors, Winnie had acted as a partner of various leading law firms, and she had also worked as an in-house lawyer for an international trustee company in Hong Kong.

Dr. Danny Po is Deloitte's Senior Advisor. Danny has more than 36 years of experience in China and Hong Kong SAR tax and business advisory services. He has been working closely with his teams in Hong Kong and the Mainland of China to provide a wide range of transaction related tax services for both in-bound and out-bound investments. Danny is an active speaker on taxation considerations of cross border transactions.



Danny was the lead engagement M&A tax partner of New Bridge's acquisition of Shenzhen Development Bank which was the first time a foreign institution was allowed to take on the majority stake of a PRC state-owned bank. He was also the lead engagement M&A tax partner of Yunfeng Fund's acquisition of a Hong Kong-listed brokerage firm Reorient Group.

Danny is a fellow member of HKICPA, ACCA, ICAEW, HKTI and HKICS. Danny has a DBA degree granted by the Hong Kong Polytechnic University and a MBA degree granted by the Chinese University of Hong Kong.

Danny's major clients served in the financial service industry includes: Agricultural Bank of China, Anbang, AON, Apollo Capital, Bank of Singapore, Bank of China, Beijing Capital, Blackstone, China Asean Fund, China Construction Bank, China Everbright, China Life, CLSA, China Merchant Bank, China Taiping, CITIC Capital, CR Capital, Deutsche Bank, Haitong Securities, Goldman Sach, HSBC, IDG Capital, JP Morgan Asset Management, New World Strategic Investment, Oaktree, PAG, Ping An Group, Qiming Capital, SAIF, Sequoia Capital, Sun Hung Kai Finance, TPG, Yunfeng Fund, YF Life Insurance.

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Succession Planning is relevant to all professionals and their clients as most successful people would like to pass on their wealth, wisdom and family values to their descendants. Different families may need different succession planning tools and structures.

In this course, we will provide you with an overview of the use of Will, Trust and Family Office in succession planning from the legal perspectives. In addition, the newly enacted Hong Kong family office tax exemption regime will be introduced by a tax expert who will also compares the relevant tax exemption regimes in Hong Kong and Singapore.

This course will cover the followings:

- Meaning of Succession Planning
- Major tools for Succession Planning
- Making a Will is necessary?
- One Will or multiple Wills?
- What is a Trust?
- A Trust structure can work magic?
- Tax considerations in Succession Planning
- Basic features of the newly enacted family office tax exemption regime
- Comparison of the HK and Singapore family office tax exemption regimes

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Code:	EVT000000422	Level:	Intermediate
Date:	6 October 2023 (Friday)	Language:	English
Time:	14:30 - 17:45 (Reception starts at 14:00)	Accreditation(s):	LSHK 3.0 CPD Points SFC 3.0 CPT Hours
Venue:	Kornerstone Institute 15/F, Hip Shing Hong Centre 55 Des Voeux Road Central Central, Hong Kong	Request for Rerun:	Please Contact Us for Details



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