

Module 4

Family Offices, Technology/ Private Equity/ Venture Capital and The Ecosystem's Opportunities & Trend

Programme Code: HRBT00P24064

27 June 2024 (Thursday)
7:00pm – 10:00pm


**3
HOURS**

HKIB ECF SFC
CPD CPD CPT

Programme Outline

1. What are the various kinds of family offices
 - What, why and how for family offices?
2. The global dynamics of family offices
 - Asia and outside of Asia
3. What do family offices look for?
 - Trends & Opportunities
 - Emerging tech trends & the 'what, why and how' is it relevant to Single and Multi-family offices?
4. How do technology entrepreneurs or Venture Capital / Private Equity fund raise from family offices?
 - What's the win-win for various parties?
 - What type of value-add do family offices look for?
 - How to convert successfully?
5. Other emerging trends and opportunities
 - Successions
 - Philanthropies
 - Generations-to-generations' 'dynamics' and 'regions-to-regions' differences / trends

Speaker Introduction

The speaker brings 30 years of experience in the Asset Management & Wealth Management industry, working in New York, Vancouver, and HK. He has worked with renowned firms like BlackRock, Goldman Sachs, Barings and Value Partners. His expertise included AM arm of Swiss, private bank experience at UBP, advisory roles with the United Nations and Forbes, active committee and board role participations in industry associations, and a strong educational background. He has also lectured at prestigious universities and spoken at major conferences

Target Audiences

1. Banking Practitioners
2. Professionals working in the tech, private equity, and venture capital industries
3. Financial institutions, legal firms, investment advisory firms, and other entities
4. HKIB Professional Qualification holders :

CAMLP AAMP CRWP ARWP

ACSP ACRP CORP AORP

CCRP(CL) CCRP(CPM) CPFINT(M) CPFINT(S-OBAP)

CPFINT(S-AIBD) CPFINT(S-DLT) CPFINT(A) CPFINT(S-RT)



Programme Delivery

Virtual Classroom (Zoom)
Cantonese

Early Bird DEADLINE

13 June 2024 (Thursday)

Application DEADLINE

20 June 2024 (Thursday)

**PRICE
LIST**

Early Bird

Regular Price

Individual
Member
HKD

HKD900

Staff of
Corporate
Member
HKD

HKD900

Non-
Member
HKD

900

HKD1,000



APPLY NOW!

(852) 2153 7800

programme@hkib.org

<https://www.hkib.org/page/121>