AIA 友邦峻宇 Alta

AIA 健康長久好生活

友邦峻宇 AIA ALTA

高淨值財富管理高峰會 2025

HNW WEALTH MANAGEMENT SUMMIT

掌握財富智慧 · 成就峻宇高峰

Master Wealth Wisdom · Reach Exquisite Heights

廣東話場 **04 / 09** (星期三)

普通話場 **04 / 10** (星期四)

8:30am – 5:30pm 活動當日設有自助午餐及茶點。

香港海洋公園萬豪酒店大宴會廳

日程

SCHEDULE

08:30 – 09:15	登記（備有早餐輕食）**Registration with light breakfast**
09:15 – 09:25	開幕辭 Opening Address
09:25 – 09:40	財富導航： 高淨值市場的潛力與發展 Navigating Wealth: Unlocking Opportunities in the HNW Market
09:40 – 10:10	家族辦公室在資產管理及家族傳承的角色 The Role of Family Offices in Asset Management and Legacy Planning
10:10 – 11:10	高淨值人士的海外稅務規劃 Cross-border Tax Planning for HNWIs
11:10 – 11:25	小休 **Coffee Break**
11:25 – 12:25	助力MBTI掌握高淨值客戶的溝通之道 Leveraging MBTI to Enhance Communication with HNW Customers
12:25 – 13:45	自助午餐 **Buffet Lunch**
13:45 – 14:15	應對傳承風險 實現家族財富有序傳承 Mitigating Succession Risks for a Structured Transfer of Family Wealth
14:15 – 15:15	法律視角下的家族信託規劃 Legal Insight into Family Trust Planning
15:15 – 15:30	**Break & Afternoon Refreshment**
15:30 – 16:45	中國高淨值人群的財富傳承考量 Wealth Succession Planning for China's HNWIs
16:45 – 17:10	掌握高淨值核保要點 Mastering Key Points in HNW Underwriting
17:10 – 17:30	活用友邦峻宇生態圈 Integrating Strategies within AIA Alta Ecosystem
17:30	高峰會完結 **Summit Ending**

活動焦點

SUMMIT HIGHLIGHTS

1 財富導航： 高淨值市場的潛力與發展

Navigating Wealth: Unlocking Opportunities in the HNW Market

利用高淨值市場研究數據，揭示高淨值財富管理市場的增長機會。探索高淨值客戶的獨特需求，並提供最新的市場分析，助您更好地了解高淨值客戶對財富管理工具的偏好及市場趨勢。

Utilizing high-net-worth market research data, reveal growth opportunities in the high-net-worth wealth management market. Explore the unique needs of high-net-worth customers and provide the latest market analysis to help you better understand HNW customers' preferences for wealth management tools and popular strategies.

2 家族辦公室在資產管理及家族傳承的角色

The Role of Family Offices in Asset Management and Legacy Planning

探索家族辦公室在全球資產管理中的角色，重點介紹合適的家辦結構以實現財富增長、保護和傳承規劃，並比較香港和新加坡的家辦稅收優惠政策。

Explore the role of family offices in worldwide asset management, highlighting suitable structures to achieve wealth growth, protection, and legacy planning, while comparing the tax benefits for family offices in Hong Kong and Singapore.

安永 EY

3 高淨值人士的跨境稅務規劃

Cross-boarder Tax Planning for HNWIs

聚焦於美國和英國的移民及跨境傳承的稅務考量，討論稅務規則、資產架構以及海外稅制對香港保單的影響。

Focuses on immigration and cross-border inheritance tax considerations in the US and UK, discussing tax rules, holding structures, and the effects of overseas tax systems on Hong Kong insurance policies.

安永 EY

4 助力MBTI掌握高淨值客戶的溝通之道

Leveraging MBTI to Enhance Communication with HNW Customers

透過MBTI助你理解不同性格的特質及溝通風格，從而調整溝通策略，讓你說話更有影響力，加強與高淨值客戶的溝通關係。

Understanding different personality traits and communication styles through MBTI can help you adjust your communication strategies, making your conversations more impactful and strengthening your relationships with high-net-worth customers.

BAIYAN Global Consulting

5 應對傳承風險 實現家族財富有序傳承

Mitigating Succession Risks for a Structured Transfer of Family Wealth

深入探討中國高淨值客戶海外資產管理的認知誤區，了解中國和海外收入的申報準則，分析資產架構及稅務居民身份規劃、以及外匯法及合法的匯款方式。

Delve into the misconception of China HNW customers with overseas assets. Analyze the overseas income reporting standard with various holding structure, tax residency planning and foreign exchange laws in China, along with legal remittance methods.

Charles Russell Speechlys

6 法律視角下的家族信託規劃

Legal Insight into Family Trust Planning

妥善運用信託可幫助家族資產世代傳承，本節將更深入了解如何透過信託契約、意願書進一步加強資產保障功能，避免財產因日後家庭出現問題而受影響。

Properly utilizing trusts can help with the generational transfer of family assets. This section will delve deeper into how letter of wishes and trust deeds can further strengthen asset protection, preventing property from being affected by future family issues.

Charles Russell Speechlys

7 中國高淨值人群的財富傳承考量

Wealth Succession Planning for China's HNWIs

深入探討中國高淨值客戶海外資產管理的認知誤區，了解中國和海外收入的申報準則，分析資產架構及稅務居民身份規劃、以及外匯法及合法的匯款方式。

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STEPHENSON HARWOOD WEI TU (CHINA)

8 掌握高淨值核保要點

Mastering Key Points in HNW Underwriting

簡明講解高淨值保單的基礎審批原理、財務核保要求、免體檢限額及體檢要求等重要事項，助您促成更多高淨值業務！

A concise explanation of the fundamental approval principles for HNW policies, financial underwriting requirements, non-medical limit, and Medical application, to help you secure more high net worth business!

9 活用友邦峻宇生態圈

Integrating Strategies within AIA Alta Ecosystem

友邦峻宇針對高淨值客戶提供建構集身心健康、財富及獨特體驗於一身的優質服務生態圈。本節將介紹如何善用友邦峻宇的配套服務，一站式滿足高淨值客戶需要，從而促成更多大額保單。

AIA Alta provides a high-quality service ecosystem that integrates physical and mental health, wealth and bespoke experiences for HNW customers. This section will introduce how to effectively utilize AIA Alta's service to meet the needs of HNW customers in a one-stop manner, thereby facilitating more mega case.

演講者履歷

SPEAKER'S BIO

安思怡律師

Ms Silvia On

合夥人，香港辦事處主管
思雅仕律師行有限法律責任合夥
Partner, Head of Hong Kong Office
Charles Russell Speechlys LLP

安律師具備豐富的私人客戶業務經驗，她為高淨值人士及家族就傳承及遺產規劃等方面提供法律服務，包括起草遺囑，就信託架構以及與遺囑認證相關的諮詢提供法律服務。安律師還為超高淨值客戶及家族辦公室提供廣泛的法律服務，包括設立私人信託公司架構和慈善機構。

憑藉在私人客戶和財富管理領域的卓越表現，安律師連續多年獲《錢伯斯高淨值指南》評為在該領域的頂尖律師，以及《亞太法律500強》的推薦。此外，安律師還榮登《亞洲法律雜誌》2022年"亞洲15佳私人財富律師"榜單。她還入選《城市財富》（Citywealth）"最具影響力領導者"、"未來領袖100強精英 – 2019年度超級律師"和"中國內地和香港10強專業精英"。安律師還榮獲《城市財富》頒發的"2018年度最佳合夥人 –IFC– 資深律師"銅獎。

Silvia has extensive experience advising high net worth individuals and families with their succession and estate planning, including preparing of wills, advising on trust structures and advising on probate related matters. Silvia also regularly assists ultra-high net worth clients and family offices with a wide range of issues including the setting up of the PTC structures and charities.

Silvia has been recognised as a leading lawyer for private wealth law (international firms) by Chambers High Net Worth Guide and named in Legal 500 Asia Pacific consecutively. Additionally, Silvia was also named in ALB Asia's Top 15 Private Wealth Lawyers 2022 by Asian Legal Business. She was also listed on the Citywealth Leaders List, and named Future Leaders Top 100: Super Advisors in 2019, as well as Top 10 Professionals in China and Hong Kong. Silvia was awarded bronze in the 'Lawyer of the Year IFC – Partner' category at Citywealth's Future Leaders Awards 2018.

楊學璋律師

Mr Ian Yeun

資深律師
思雅仕律師行有限法律責任合夥
Senior Associate
Charles Russell Speechlys LLP

安律師具備豐富的私人客戶業務經驗，她為高淨值人士及家族就傳承及遺產規劃等方面提供法律服務，包括起草遺囑，就信託架構以及與遺囑認證相關的諮詢提供法律服務。安律師還為超高淨值客戶及家族辦公室提供廣泛的法律服務，包括設立私人信託公司架構和慈善機構。

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夏瑄澧女士

Ms. Sherry Hsia

創辦人
百彥國際發展顧問有限公司
Founder
Baiyan Global Consulting

Sherry 是一位組織心理學家、顧問與作家，擁有美國哥倫比亞大學心理與社會學學士，以及教育學院的組織心理碩士學位。她擅長協助個人與團隊在跨文化與變動中成長，持有MBTI、IDI 跨文化能力測評與 Hogan 性格測評等國際認證。目前她經營顧問公司，也主持 YouTube 頻道《雪力的心理學筆記》，分享心理學在生活與職場中的應用。曾旅居台灣、雪梨、紐約與舊金山，擁有豐富的跨文化經驗。

Sherry is an organizational psychologist, consultant, and writer. She holds a bachelor's degree in Psychology and Sociology from Barnard College, Columbia University, and a master's degree in Organizational Psychology from Columbia University's Teachers College. She is certified in MBTI, the Intercultural Development Inventory (IDI), and the Hogan Personality Assessment. Sherry runs her own consulting firm and hosts a YouTube channel called Sherry's Notes, where she shares insights on psychology in everyday life. Having lived in Taiwan, Sydney, New York, and San Francisco, she brings a wealth of cross-cultural experience to her work.

王文暉女士

Ms. Karina Wong

企業服務稅務合伙人合伙人
安永稅務及諮詢有限公司
Tax Partner of Ernst & Young Tax Services Ltd

王女士是安永香港與澳門私人企業稅務服務及家族企業服務主管合夥人，擁有多年提供稅務諮詢與合規服務的經驗，專門為跨國及本地企業提供稅務規劃及跨國諮詢服務。她曾為多家澳洲中端客戶擔任稅務顧問，並於2007年加入安永香港稅務部。根據客戶不同需求提供對應的商業諮詢及企業稅務服務，王女士致力於協助客戶成就目標。她亦在稅務合規、企業重組、跨國交易、稅務盡職調查就拼購、境內外投資和實施稅務有效策略有豐富的經驗。

除此之外，王女士擁有多年為企業家提供個人及家庭服務的經驗，她還專注於為超高淨值客戶提供一套全面訂造的專業服務，包括商業和資產管理結構，企業接班規劃、人才流動諮詢服務、慈善信託規劃、家族治理與家族辦公室諮詢等。

Karina Wong, the Greater China Business Tax Services Leader, Greater China EY Private Tax Co-leader, and Greater China Family Enterprise Leader at Ernst & Young Tax Services Limited ("EY"), joined EY in 2007 bringing considerable experience and expertise as a tax advisor to mid-market clients in Australia. She is dedicated to helping clients achieve business success by providing business advisory and corporate taxation services that meet each client's unique objectives. She also has expertise in tax compliance, business restructuring, cross border transactions, tax due diligence and advising on the taxation aspects of mergers and acquisitions, inbound and outbound investments and implementation of tax effective strategies.

Having many years of experience in serving entrepreneurial individuals and families, she also focuses on providing UHNW clients with direct access to a comprehensive suite of personalized services, e.g. business and asset management structuring, succession planning, mobility advisory services, philanthropic planning, family governance and family office advisory, etc.

蘇苑熒女士

Ms. Clara So

私人企業服務稅務經理
安永稅務及諮詢有限公司
Manager of Ernst & Young Tax Services Ltd

蘇小姐，安永香港私人企業稅務服務經理，專注於香港稅務與商業諮詢服務以及私人客戶服務。蘇小姐在稅務和商業諮詢方面擁有豐富的經驗，為高淨值人士提供量身定制的服務。她的專業領域包括個人稅務建議和實施服務，如稅務居民身份分析、信託相關稅務建議、個人報稅和家族辦公室規劃。

蘇小姐還為客戶提供海外移民和離岸重組的建議，經常與安永的國際團隊合作，提供全面的跨境稅務諮詢和合規服務。此外，她還為零售、製造、房地產和酒店等各行業的客戶提供香港稅務諮詢和合規服務。

Clara So is a Manager at Ernst & Young Tax Services Limited, specializing in Hong Kong Tax & Business Advisory Services and Private Client Services. With extensive experience in tax and business advisory, Clara has been providing tailored services to high-net-worth individuals. Her expertise includes individual tax advice and implementation services such as tax residency analysis, trust-related tax advice, individual tax filings, and family office planning.

Clara also advises clients on overseas immigration and offshore restructuring, frequently collaborating with Ernst & Young's international teams to deliver comprehensive cross-border tax advisory and compliance services. Additionally, she has offered Hong Kong tax advisory and compliance services to clients across various industries, including retail, manufacturing, real estate, and hospitality.

姜璐璐律師

Ms Joanna Jiang

偉途律師事務所偉途律師事務所合夥人
Partner of Wei Tu Law Firm

姜璐璐律師，是國際律所 Stephenson Harwood 的中國聯營所合夥人。在私人財富業務領域，姜律師擅長為高淨值家族客戶提供全流程法律服務方案，包括家族企業架構跨國重組與稅務規劃、家族信託設立、境外投資合規、民營風險隔離、傳承規劃諮詢等。客戶評價姜律師「專業過硬、擅於洞察客戶需求，解決方案創新、務實」。

姜律師專注於跨國投資、私募股權，和高淨值家族財富規劃與稅務諮詢，代表客戶包括外資投資、跨國公司、境內和境外上市公司、大型民營、生醫藥和高科技領域創辦人。

Joanna Jiang, a private wealth partner from Wei Tu Law Firm which is a PRC alliance law of Stephenson Harwood. In the private wealth sector, she has extensive knowledge in cross-border structures, trust and estate planning, and business succession planning. Her practice centres on handling complex issues including corporate restructuring across multiple jurisdictions, establishing trusts for succession planning and compliance with a view to de-risking and mitigating tax exposure. Joanna forms strong relationships with her clients. She is attentive, dedicated and can offer innovative solutions.

Joanna focuses on M&A, PE/VC investments, Employee Stock Ownership Plans (ESOP) and private wealth advice. She represents top tier clients including Goldman Sachs, OCBC, listed companies, Fortune 500 companies, and biopharma and high-tech startups.

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