香港恒生大學
THE HANG SENG UNIVERSITY OF HONG KONG

商學院
School of Business

IARFC Hong Kong/Macau



家族辦公室顧問行政證書課程

Executive Certificate in Family Office Consulting

2026年10月16-17, 23-24, 30日 | 16–17, 23–24, 30 October 2026

課程概覽
PROGRAMME OVERVIEW



家族辦公室顧問行政證書課程

Executive Certificate in Family Office Consulting

課程內容
COURSE CONTENT

本行政證書課程旨在為專業人士提供管理家族辦公室顧問的專業知識與實務技能，涵蓋財富管理、家族治理、信託架構及稅務規劃等核心範疇。透過全面且實務導向的教學模式，學員將掌握家族辦公室的運作模式，使其能在日益複雜的金融環境中為高淨值家族提供量身定制的解決方案。

This programme equips participants with professional knowledge and practical skills in family office consulting, covering wealth management, family governance, trust structures and tax planning. Participants will understand family office operations, learn to develop family constitutions, and apply international best practices to serve ultra-high-net-worth families.

適合對象
TARGET PARTICIPANTS

本課程適合以下多元專業人士參與:

The Executive Certificate in Family Office Consulting programme is ideally targeted at a diverse range of professionals, including:

1. **財務顧問與財富管理經理 Financial Advisors and Wealth Managers**

   希望深入理解家族辦公室架構並增進對高淨值客戶服務的人士。
   Individuals looking to deepen their understanding of family office structures and enhance their service offerings to high-net-worth clients.

2. **投資顧問 Investment Consultants**

   旨在為家族辦公室制定符合富裕家庭目標與價值觀的定制投資策略的專業人士。
   Professionals aiming to develop tailored investment strategies for family offices that align with the unique goals and values of wealthy families.

3. **家族辦公室從業人員 Family Office Executives**

   現職或有意投身家族辦公室領域,希望提升運營知識與管理技能的人士。
   Current or aspiring professionals working within family offices who want to enhance their operational knowledge and management skills.

課程大綱

COURSE OUTLINE

1 Introduction to Family Office and its Ecosystem 家族辦公室及其生態系統導論

- 定義家族辦公室及其職能
  Defining family offices and their purpose
- 分析家族辦公室管理的演變與當前趨勢
  Examining the evolution and current trends in family office management
- 區分單一家族辦公室（SFO）、聯合家族辦公室（MFO）及虛擬家族辦公室（VFO）
  Differentiating between single-family offices (SFOs), multi-family offices (MFOs),and virtual family offices (VFOs)
- 探討家族辦公室專業人員的角色與責任
  Exploring the roles and responsibilities of family office professionals
- 探討設立家族辦公室之戰略考量
  Exploring the strategic issues and requirements in setting up family offices
- 識別家族辦公室的常見挑戰
  Identifying common issues and problems faced by family offices

2 Structuring, Formulating Family Constitution 家族憲章制定與架構設計

- 理解家族憲章的重要性與目的
  Understanding the importance and purpose of a family constitution
- 起草家族價值觀、使命、願景及原則
  Drafting and codifying family values, mission, vision, and principles in the constitution
- 定義家族成員與持份者的治理架構、角色與責任
  Defining governance structures, roles, and responsibilities of family members and stakeholders
- 解決所有權、決策流程、衝突解決機制等議題
  Addressing key topics such as ownership rights, decision-making processes, conflict resolution mechanisms, and family member participation in the family office
- 識別家族辦公室內部常見的爭議與衝突
  Identifying common disputes and conflicts that arise within family offices
- 分析家族辦公室常見糾紛調解方式
  Analyzing dispute resolution mechanisms, such as mediation, arbitration, and litigation

課程大綱

COURSE OUTLINE

3 Sustainable Investment Management and Portfolio Strategy 可持續投資管理與組合策略

- 根據家族辦公室的需求，設計投資策略及資產配置模型
  Designing investment strategies and asset allocation models tailored to family office requirements
- 分析傳統及另類投資工具，包括股票、固定收益產品、私募股權、房地產、對沖基金及風險投資
  Analyzing traditional and alternative investment vehicles, including equities, fixed income, private equity, real estate, hedge funds, and venture capital
- 實施風險管理與多元化投資組合策略
  Implementing risk management techniques and diversification strategies within family office portfolios
- 投資績效評估與製作綜合報告
  Measuring investment performance and preparing comprehensive reports for stakeholders

4 Family Office Governance, Regulations and Risk Management 家族辦公室治理、法規與風險管理

- 掌握家族辦公室行業監管與規範
  Understanding key sector rules and regulations in the family office industry
- 應用信託規劃工具，保護家族財富與傳承
  Applying trust planning tools and techniques to safeguard family wealth and succession
- 評估財富轉移策略（信託、基金會、慈善捐贈等）
  Evaluating wealth transfer strategies, such as trusts, foundations, and charitable giving
- 實施資產保護措施與風險緩解策略
  Implementing relevant asset protection measures and risk mitigation strategies
- 確保合規性與處理風險管理議題
  Ensuring compliance with legal regulations and addressing risk management concerns
- 建立有效的家族辦公室治理制度與內部控制流程
  Establishing effective governance structures and processes within family offices
- 制定家族憲章並發展家族辦公室政策
  Formulating family constitutions and developing family office policies

課程大綱

COURSE OUTLINE

5 Tax Planning and Succession Planning
家族辦公室稅務與財富傳承規劃

- 應對高淨值家庭的複雜稅務考量
  Navigating the complex landscape of tax considerations for high-net-worth families
- 制定國際稅務規劃與跨境投資策略
  Developing international tax planning strategies and managing cross-border investments
- 為家族辦公室需求量身定制的稅務高效結構
  Implementing tax-efficient structures and strategies tailored to family office needs
- 符合稅務法規和報告要求
  Ensuring compliance with tax regulations and reporting requirements

6 Trusts and Cross- Border Wealth Structuring 信託與跨境財富傳承及規劃

- 深入了解家族辦公室在企業傳承與股權繼承方面所面對的複雜議題
  Understanding the complexities of corporate inheritance within family offices
- 制定企業擁有權平穩過渡及家族傳承規劃策略
  Designing strategies for smooth ownership transitions and succession planning
- 探討家族企業於治理架構、決策機制及權責分工方面的關鍵挑戰
  Addressing governance issues related to family-owned businesses
- 研究企業接班過程中家族成員與非家族管理層的角色協調與管理策略
  Managing family and non-family executives in the context of corporate succession
- 分析信託面臨的法律挑戰、爭議風險及防禦機制
  Attacks on trusts

課程大綱

COURSE OUTLINE

7 Philanthropy, ESG and Impact Investing 慈善事業與影響力投資

- 理解慈善事業在家族辦公室中的重要性
  Understanding the significance of philanthropy in family office operations
- 探索影響力投資方法與框架
  Exploring impact investing approaches and frameworks
- 建立與管理家族基金會及慈善項目
  Establishing and managing family foundations and philanthropic initiatives
- 評估慈善項目的影響力與成效
  Assessing the impact and effectiveness of philanthropic endeavours
- 信託管理、會計與申報要求概論
  Examining trust administration, accounting, and reporting requirements
- 信託的法律風險與挑戰
  Attacks on trusts

8 Family Office Operations, Technology and Case Studies 家族辦公室營運、科技應用與行政管理

- 人工智慧在家族辦公室的應用
  Adopting of AI tools in the family office environment
- 專業團隊組建與管理
  Recruiting and managing a skilled workforce for family offices
- 成本效益最大化的外包策略
  Leveraging outsourced functions to maximize the economies of scale
- 數位化運營系統導入以簡化營運流程
  Implementing technology solutions for streamlined family office operations
- 聘用內部專業人員管理投資組合系統、報告工具與網絡安全措施
  Hiring in house professionals to look after portfolio management systems, reporting tools, and cybersecurity measures

您可透過本培訓課程獲得什麼?
What will you gain from the training course?

完成課程後,學員將能夠:
Upon successful completion of the Executive Certificate in Family Office Consulting, participants will be able to:

◆ 01 **解析家族辦公室Understand Family Offices**

明確定義並區分單一家族辦公室（SFO)、聯合家族辦公室（MFO）及虛擬家族辦公室（VFO)，掌握其設立目的與組織架構。
Define and differentiate between single-family offices (SFOs), multi-family offices (MFOs), and virtual family offices (VFOs), along with their respective purposes and structures

◆ 02 **掌握治理核心 Recognise Governance Essentials**

剖析家族憲章的核心要素，理解治理機制在家族辦公室運作中的重要性。
Identify the key elements of a family constitution and understand the importance of governance in family office operations.

◆ 03 **投資管理概覽 Overview of Investment Management**

洞悉適用於家族辦公室相關的基礎投資策略與資產配置模型。
Gain insights into fundamental investment strategies and asset allocation models relevant to family offices.

◆ 04 **應對監管框架 Navigate Regulatory Frameworks**

熟悉影響家族辦公室的關鍵法規與合規要求。
Familiarize themselves with essential regulations and compliance considerations that affect family offices.

◆ 05 **稅務規劃概念 Introduce Tax Planning Concepts**

掌握高淨值家族的稅務籌劃要點，包括國際稅務規劃基礎 。
Understand the fundamental tax considerations for high-net-worth families, including the basics of international tax planning.

您可透過本培訓課程獲得什麼?
What will you gain from the training course?

完成課程後,學員將能夠:
Upon successful completion of the Certificate in Family Office Consulting, participants will be able to:

◆ 06 **探索傳承規劃 Explore Succession Planning**
認識傳承規劃的重要性及家族企業常用傳承策略。
Recognize the importance of succession planning and the common strategies employed in family-owned businesses

◆ 07 **解析信託架構 Examine Trust Structures**
了解不同信託類型及其在財富傳承與資產保護中的角色。
Acquire a basic understanding of different types of trusts and their roles in wealth preservation and asset protection.

◆ 08 **慈善事業與影響力投資 Appreciate Philanthropy & Impact Investing**
理解慈善事業在家族辦公室中的意義及探索影響力投資基礎原理。
Understand the significance of philanthropy within family offices and explore the basic principles of impact investing.

◆ 09 **營運實踐應用 Identify Operational Practices**
探討科技應用對如何提升家族辦公室效率，掌握高效團隊管理要訣。
Recognize the role of technology in enhancing family office operations and the importance of effective workforce management.

◆ 10 **實戰案例演練 Engage with Real-World Scenarios**
透過情境研討將理論知識應用於解決家族辦公室的實際挑戰。
Participate in case studies and discussions to apply knowledge to practical challenges faced by family offices.

資歷認證途徑
Qualification Pathway

課程獲IARFC認可，學員如成功修畢並同時符合IARFC的規定，將可獲頒授 **認證家族辦公室顧問師** (Registered Family Office Consultant，簡稱 RFOC) 專業認證

This programme is recognized by the International Association of Registered Financial Consultants (IARFC). Participants who successfully complete the programme and satisfy the relevant IARFC requirements will be eligible to obtain the Registered Family Office Consultant (RFOC) professional designation.



課程詳情 Programme Details

本課程為期5天面授教學,結合課堂講授、案例研討與專題匯報
The programme is offered in a 5-day face-to-face study mode. The teaching formats are lectures, case studies, and presentations

教學語言 Medium of Instruction

粵語，輔以英語教材
Cantonese supplemented with English

授課地點 Venue

西九龍博物館道38號M+15樓 TC01 /TC03/TC05室
Room TC01/TC03/TC06, 15/F, M+, West Kowloon Cultural District, 38 Museum Drive, Kowloon

課堂時數 Duration

課堂總時數: 31小時
Total Contact Hours: 31

學費 Tuition Fee

HK$18,000

學習考核 Assessment

課程結束後學生須提交一份作業評核，作為課程考核要求之一

Upon completion of the programme, participants are required to submit an assignment for assessment.
An Executive Certificate in Family Office Consulting will be conferred upon participants who attain full class attendance and successfully pass the assessment.

截止報名日期 Enrolment Deadline

2026年10月9日
9 October 2026

關於RFOC專業認證
About the Registered Family Office Consultant (RFOC) Professional Certification

RFOC是Registered Family Office Consultant (認證家族辦公室顧問師)的簡稱，是IARFC頒授予在教育、經驗和誠信各方面均達至專業水準的財務顧問會員之專業認證。

RFOC (Registered Family Office Consultant) is a professional certification conferred by the IARFC on qualified financial advisers who meet rigorous standards in education, professional experience, and ethical conduct, recognizing their expertise in serving family office and wealth management clients.

入學要求

- 具最少8年全職財務策劃、財富管理、金融服務或相關工作經驗; 或

  A minimum of 8 years of full-time experience in financial planning, wealth management, financial services, or a related field; or

- 具最少3年全職財務策劃、財富管理、金融服務或相關工作經驗; 並持有認可大學學位; 或

  A minimum of 3 years of full-time experience in financial planning, wealth management, financial services, or a related field, and possession of a recognized university degree; or

- 具最少5年全職財務策劃、財富管理、金融服務或相關工作經驗; 並持有認可專上學歷; 或

  A minimum of 5 years of full-time experience in financial planning, wealth management, financial services, or a related field, and possession of a recognized post-secondary qualification; or

- 持有專業法律、會計、精算、財務分析等執業資格或同等資歷

  Holding a professional qualification or equivalent credentials in law, accounting, actuarial science, financial analysis, or other related professions.

課程查詢 ENQUIRY

Ms Kammy Woo (胡小姐),
School of Business, HSUHK

+852 3963 5551

eecl@hsu.edu.hk



報名方式 HOW TO REGISTER

請填妥後頁報名表格連支票 (如適用)並發送至 (於09/10/2026前)
"國際認證財務顧問師協會港澳中心有限公司"

Please complete the registration form on the following page and send it to (before 9 Oct 2026):

"International Association of Registered Financial Consultants Hong Kong and Macau Centre Company Limited (IARFC Hong Kong and Macau Centre Co Ltd)".

香港恒生大學 THE HANG SENG UNIVERSITY OF HONG KONG | 商學院 School of Business | IARFC Hong Kong/Macau

家族辦公室顧問行政證書課程2026年10月班
Executive Certificate in Family Office Consulting Program, October 2026
課程報讀申請表

請準確及完整填寫以下資料。請確保所有資料清晰無誤，以便進行核實及驗證

第一部份 個人資料

姓名 (中文)	:	
姓名 (英文)	:	
性別	:	
出生日期	: / /	[MM / DD / YYYY]
聯絡電話	:	
電郵 (必須填寫)	:	
職業	:	

第二部份 付款方式

課程費用 HK$18,000

(請於合適方格內 ✔)

☐ 支票付款 (適用於持有本港銀行戶口) [連同表格一同寄出]

支票抬頭： The Hang Seng University of Hong Kong 或 香港恒生大學

支票號碼： 銀行：

☐ 電匯 (適用於跨境或國際匯款; 需繳$250銀行手續費) [詳情請致電 39635723 (胡小姐)查詢]

注意事項:

(1) 國際認證財務顧問師協會港澳中心有限公司及香港恒生大學商學院將分別獲提供報讀人士所填報的課程報讀申請表的正本或副本以供進行入學審批。
(2) 所有報讀課程的申請均需要通過「課程取錄委員會」(Program Admission Committee) 的審批。
(3) 舉辦機構保留更改課程日期、時間、地點、導師、學科次序及按需要調整已定學科內容的權利。
(4) 除非課程額滿或取消，學員一經取錄，已繳交的課程相關費用在任何情況下一概不獲退還。

第三部份 申請人聲明

(1) 本人現申請報讀「家族辦公室顧問行政證書課程」2026 年10 月班，並同意及接受不能轉讀課程。
(2) 本人知悉並接受必須在本課程的出席率達 100%並於每學科評核獲評為合格才符合通過課程的規定。

申請人簽署 日期

遞交課程報讀申請表:

請把**課程報讀申請表、支票 (如適用)及相關證明文件(如: 學歷&工作經驗)**遞交至**國際認證財務顧問師協會港澳中心有限公司**

*(電郵、傳真、郵寄、快遞、親遞均可，**但攝影文件一概不獲接受**)

地址：香港灣仔軒尼詩道 302 – 308 號集成中心 22 樓 2211 室

電話：2368 5768 / 3152 2314 電郵：info@iarfc-hk.org WhatsApp：6599 0078 傳真：3152 3060