



## Hong Kong's Asset Management Industry – Key Growth Drivers in the Coming Decade

Following the success of the annual conferences hosted since 2007, the Hong Kong Investment Funds Association (“HKIFA”) will hold its 4th annual conference in October this year, at JW Marriott Hotel Hong Kong.

In 2009, we witnessed an amazing rebound in global markets as we were recovering from one of the greatest shocks in the history of financial markets. Although Asia was less hard-hit by the crisis, it did incur a lot of changes in the financial industry. Hong Kong was not immune from this process and in fact, we have witnessed changes in many aspects, from regulation to the business model, of the industry.

Whilst the world financial system is reshaping, the industry is trying to reposition itself to address the challenges. We have to identify new business opportunities and ensure that we do not lag behind during this critical growth period.

Having been a leading player in the asset management and wealth management arenas in the region for a long time, Hong Kong must remain vigilant and should be working hard not only to reinforce our strong fundamentals that underpin our success, but also to evolve further to strengthen our competitive edge in the coming decade.

This year's theme, “**Hong Kong's Asset Management Industry – Key Growth Drivers in the Coming Decade**”, examines the changes to the asset management industry resulting from the challenges we faced and how these will affect the way our industry moves forward from here to the next decade with a view to riding out from the turbulent time and emerging to be even more competitive. The dynamic group of leading speakers and panelists, from the different perspectives of regulators, fund managers, distributors, academics and the media, will have an in-depth discussion on the key growth drivers for the industry and highlight how the industry can gear up for the challenges and capitalize on the opportunities provided.

The event provides great learning and networking opportunities for industry professionals and executives who are looking for a platform to exchange ideas and expand their business networks.

### WHO SHOULD ATTEND

- Asset Allocators
- CEOs, CFOs, CIOs
- Compliance Officers
- Custodians & Administrators
- Distributors
- Family Offices/Endowments/Foundations
- Finance Directors
- Financial Planners
- Fund Managers
- Institutional Sales
- Investment Advisors
- Investment Consultants
- Legal Practitioners
- Private Bankers
- Product Managers
- Regulators
- Trustees
- Wealth Managers



TIME	PROGRAMME
8:15 - 8:45	<b>Registration</b>
8:45 - 8:50	<b>Welcoming Remarks</b> Desmond Ng, HKIFA Chairman
8:50 - 9:10	<b>Keynote Speech</b> <b>Reinforcing HK as an asset management hub in Asia</b> Prof. K C Chan, Secretary for Financial Services and the Treasury, The Government of the HKSAR
9:10 - 9:40	<b>Keynote Speech</b> <b>A new landscape for retail investment products</b> Martin Wheatley, Chief Executive Officer, Securities and Futures Commission
9:40 - 10:25	<b>Panel Discussion</b> <b>How do the recent regulatory changes affect HK as a wealth management centre in Asia?</b> Moderator: Sam Yu, HKIFA Regulatory Subcommittee member Panel members: <ul style="list-style-type: none"> <li>- Jacky Chan, CEO, Hong Kong and Macau, American International Assurance Company (Bermuda) Limited</li> <li>- Christina Choi, Director, Investment Products, Securities and Futures Commission Hong Kong</li> <li>- Billy Mak, Associate Professor of Department of Finance &amp; Decision Sciences and Associate Director of MBA Programme (HK Class), Hong Kong Baptist University</li> <li>- Eleanor Wan, Chief Executive Officer, Institute of Financial Planners of Hong Kong</li> </ul>
10:25 - 10:40	Coffee Break
10:40 - 11:25	<b>Panel Discussion</b> <b>Opportunity sets for fund managers – How do multinational and mainland fund managers see HK’s role as an asset management centre</b> Moderator: Kerry Ching, HKIFA Executive Committee member Panel members: <ul style="list-style-type: none"> <li>- Nick Good, Managing Director, Head of iShares, Asia-Pacific, BlackRock</li> <li>- Anthony Ho, Managing Director and Deputy Chief Executive Officer, China Asset Management (Hong Kong) Limited</li> <li>- Peter Lee, Chief Executive Officer, Mirae Asset Global Investments (Hong Kong) Limited</li> <li>- Joe Ngai, Partner, McKinsey &amp; Company, Inc. HK</li> </ul>
11:25 - 12:25	<b>Panel Discussion</b> <b>Investor protection in MPF – tip-toeing on a balance beam</b> Moderator: Michael Ha, HKIFA Pensions Subcommittee vice chairman Panel members: <ul style="list-style-type: none"> <li>- Michael Huddart, Executive Vice President &amp; Chief Executive Officer, Hong Kong, Manulife (International) Limited</li> <li>- Darren McShane, Executive Director (Regulation &amp; Policy), Mandatory Provident Fund Schemes Authority</li> <li>- David Rossiter, Head of Human Resources, Hospital Authority</li> <li>- Rachel So, Veteran Media Professional</li> </ul>
12:25 - 13:10	<b>Panel Discussion</b> <b>The digital evolution of the asset management industry</b> Moderator: Marco Tang, HKIFA Unit Trust Subcommittee member Panel members: <ul style="list-style-type: none"> <li>- Ada Chiu, Head of Direct Channels, Personal Financial Services, The Hongkong and Shanghai Banking Corporation Limited</li> <li>- Patrick Ho, Managing Director, iFAST Financial (HK) Limited</li> <li>- Damien Mooney, Head of Regional Marketing Initiatives, Asia Pacific, FIL Investment Management (Hong Kong) Limited</li> <li>- Barney Loehnis, Head of Digital, OgilvyOne, Asia Pacific</li> </ul>
13:10 - 14:25	<b>Luncheon</b> <b>The state of the Asian asset management industry in a global context</b> Speaker: Daniel S. Enskat, Senior Managing Director, Head of Global Consulting, Strategic Insight Moderator: Lieven Debruyne, HKIFA Executive Committee member
14:25 - 14:30	<b>Closing Remarks</b> Terry Pan, HKIFA Vice Chairman

• Please note that the programme and speakers are subject to change.

#### Registration Fee

Members of HKIFA / Endorsing Organizations / Staff of other Fund Associations	HK\$2,300 per person*
Standard Fee	HK\$3,300 per person*

\* The fee includes the conference cost, lunch, refreshment and conference documentations.

#### Registration Methods

 <b>Mail</b> Room 1203, Century Square, 1-13 D'Aguilar Street, Central, Hong Kong	or	 <b>Fax</b> (852) 3905-7075	or	 <b>Email</b> hkifa@plus-concepts.com	or	 <b>Online</b> http://www.plus-concepts.com/hkifa2010
<b>Enquiries:</b>  (852) 8203-6091 or email to <a href="mailto:hkifa@plus-concepts.com">hkifa@plus-concepts.com</a>						

#### Registration Form

HKIFA member  
 Member of the following endorsing organization:  
 \_\_\_\_\_  
 Staff of other fund associations  
 None of the above

Mr.     Ms.     Mrs.     Dr.

**(Please Use BLOCK LETTERS)**

Name: \_\_\_\_\_

Email: \_\_\_\_\_

Job Title: \_\_\_\_\_

Department: \_\_\_\_\_

Company/Organization: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Nature of Business: \_\_\_\_\_

Tel:(        ) \_\_\_\_\_ Fax:(        ) \_\_\_\_\_

Mobile: \_\_\_\_\_

\_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

\_\_\_\_\_

For statistical purposes:

CPD hr - MPFA     CPT hrs - SFC     CPD hrs - Law Society of HK

#### Event Organizer

This event is organized by the Hong Kong Investment Funds Association ("HKIFA"). Plus Concepts has been appointed as the event manager of this Conference to collect payments and handle registrations. For more information, please contact Plus Concepts at (852) 8203-6091.

#### Accreditations

Securities & Futures Commission Hong Kong	4.5 CPT Hours*
Mandatory Provident Fund Schemes Authority	1 Core CPD Hour**
The Law Society of Hong Kong	5.5 CPD Points

\*Subject to individual company's compliance approval.

\*\*For the session: "Investor protection in MPF - tip-toeing on a balance beam"

IIQAS CPD: This conference may be recognised as a qualified CPD activity for the IIQAS CPD Programme. Please refer to the home page of the event website for details.

#### Payment Methods

Registration is confirmed only upon receipt of full payment. Upon receipt of full payment, Plus Concepts will issue an email confirmation and an official receipt by post. Payment can be made by

- (1) **Cheque:** Hong Kong bank cheque payable to **Plus Concepts**  
 Please include the participant's name on the back of the cheque, and mail it to:  
 Plus Concepts  
 Room 1203, Century Square  
 1-13 D'Aguilar Street  
 Central, Hong Kong

- (2) **By Bank Transfer into Plus Concepts account**  
 Name of Beneficiary: Plus Concepts  
 Address: Room 1203, Century Square, 1-13 D'Aguilar Street, Central, HK  
 Beneficiary Bank: HSBC (Address: 1 Queen's Road Central, Hong Kong)  
 Bank Code: 004  
 Account No.: 400 588083 838  
 SWIFT Code: HSBC HK HHH KH

Remarks: -Participant's name must be input on the bank transfer form as a reference  
 -All the local and overseas bank charges should be paid by the participant

- (3) **Credit Card Payment:** Only available through online registration on website [www.plus-concepts.com/hkifa2010](http://www.plus-concepts.com/hkifa2010)

#### Other Information

**Venue:** Grand Ballroom, JW Marriott Hotel Hong Kong. (Address: One Pacific Place, 88 Queensway, Hong Kong SAR)

**Substitutions:** You may make substitution at any time before the conference. Please notify us as soon as possible. **Conference fees will not be refunded.**

**Rescheduling:** The conference will be cancelled if No. 8 typhoon signal or black rainstorm warning is hoisted on the event day. In the event of cancellation due to bad weather, the conference will be rescheduled. Conference fees will not be refunded.

**Accommodation, Travel and Other Incidental Expenses:** We are NOT responsible for covering accommodation, airfare, other travel or incidental costs incurred by registrations.

**Bank Charges and Expenses:** Any bank charges and/or expenses incurred as a result of bounced cheques and/or wire transfer will be borne by the participants.

**Disclaimer:** We reserve the right to alter the contents of this conference and/or the identity of the conference presenters due to circumstances beyond our control.

**Incorrect Mailing Information:** It is possible that you may receive multiple mailings of this event or incorrect company details on the labels, for which we apologise. If this happens, please let us know so that we can update our database immediately and we hope you will pass the duplicated copies on to your colleagues. If you do not wish to have your name on our mailing list, please let us know and we will remove it from our database accordingly.

**Privacy:** Personal data are gathered in accordance with the Personal Data (Privacy) Ordinance. The personal data collected from you may be used by HKIFA/Plus Concepts for statistical purposes. HKIFA/Plus Concepts will cease to use the personal data for any purpose if you request us to do so and accordingly the personal data will be erased and/or destroyed.

**Passport & Visa:** A visitor must, upon arrival in Hong Kong, present a valid travel document and visa (if a visa is required). For details, please visit the HKSAR government website: [www.immd.gov.hk/ehhtml/hkvisas\\_4.htm](http://www.immd.gov.hk/ehhtml/hkvisas_4.htm). You may require a letter from the event host, detailing the nature and duration of your proposed stay in Hong Kong with your visa application. The letter is available on request from [hkifa@plus-concepts.com](mailto:hkifa@plus-concepts.com).

#### Hong Kong Investment Funds Association

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