

Certificate in Family Office Management Application Form

Name in English			
Name in Chinese			
Mobile No.		Telephone No. (Home)	
Gender	Male <input type="checkbox"/> Female <input type="checkbox"/>	HKID No. (First 4 digits)	
E-mail Address			
Correspondence address			
Working Experience		Position	
		Position	
Education			
Professional Qualifications			
Course	<input type="checkbox"/> Full Course HK\$13,000.00 <input type="checkbox"/> Module 1 HK\$5,000.00 <input type="checkbox"/> Module 2 HK\$5,000.00 <input type="checkbox"/> Module 3&4 HK\$5,000.00		
Payment Method	<input type="checkbox"/> Cheque : _____ <input type="checkbox"/> EPS : _____		

Application Details

Completed application form, together with tuition fees, should be submitted

1. by post to Centre for Advanced and Professional Studies, Rm 202, 2 Chui Ling Lane, Tseung Kwan O, N.T. ; OR
2. in person to CAPS office.

Tuition fees can be paid by cheque or EPS. Payment by cheque must be made payable to "Caritas Institute of Higher Education" with the name and contact number of the applicant, and the programme title written at the back of the cheque.

Signature: _____

Date: _____



明愛專上學院
Caritas Institute of Higher Education

高等及專業教育中心
Centre for Advanced and
Professional Studies (CAPS)

廖湯慧靄商業及款待管理學院
Rita Tong Liu School of Business and
Hospitality Management

Certificate in Family Office Management



Enquiry & Application:

Venue: Caritas Institute of Higher Education,
2 Chui Ling Lane, Tseung Kwan O
(Tiu Keng Leng MTR Station, Exit B)

Tel: 3653 6700

Email: caps@cihe.edu.hk

<http://caps.cihe.edu.hk>



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**CBCC & CIHE Centre for Advanced
and Professional Studies - CAPS**



Objectives:

- To equip participants with up-to-date knowledge in regulations and compliance for setting up and managing a family office;
- To enable participants to build or improve the skills to manage high-end family assets; and
- To generate discussions on family history and value as well as the importance of social responsibility for sustainable growth of family offices.


Target Participants:

- Founders or next generation of families with high-end assets
- Professionals in family office, wealth management and private banking
- Employees of financial institutes including commercial banks, trusts and funds, securities and futures companies, insurance companies and wealth management
- Legal and accounting professionals
- Those who are interested in pursuing their career in family offices

Couse Outline:

- Module 1: Family Office Essentials (3 lectures@3 hours)
- Module 2: Family Office and Wealth Management Tools (3 lectures@3 hours)
- Module 3: Family Office and Financial Services Markets (2 lectures@3 hours)
- Module 4: Sustainable Growth for Family Office (1 lecture@3 hours)
- Workshop: Case Study and Presentations (3 hours)

Instructor:



Dixon Wong

Managing Partner and Head of Wealth Management & Family Office, Oakwise Capital

Special Adviser to President, U&I GROUP

Committee Member and Family Office Expert, Shenzhen Cross Border PE Investment Fund

Honorary Lecturer in Family Office Management Strategy, HKU SPACE

2019-2023
Head of Financial Services and Global Head of Family Office, Invest Hong Kong, HKSAR Government

1996-2019
Executive Director, Global Banking and Markets, HSBC

1994-1996
Senior Auditor, Financial Institutions Group, Ernst & Young

Mr. Wong was the Head of Financial Services and Global Head of Family Office at Invest Hong Kong from 2019 to 2023, a government department of HKSAR helping overseas and Mainland financial institutions and family offices to establish and/or expand their business presence and investments in Hong Kong. Mr. Wong spent more than 20 years, from 1996 to 2019, as an Executive Director at HSBC Global Banking and Markets/Investment Banking before joining the HKSAR Government. He also worked as a Senior Auditor at Ernst & Young, one of the big four international accounting firms in the audit and assurance division.

Mr. Wong is experienced in the investment banking, private banking, asset & wealth management, family enterprise, family office and private wealth sectors. He is not only familiar with the business operations and products of European banks but also with Asian cultures and client needs. He is eager to collaborate with other financial institutions and family offices to expand the Mainland China market and offer the finest possible quality of service.

Mr. Wong holds MBA and LLB (Hons) degrees from the UK. Additionally, he holds the designations of Fellow Chartered Accountant (FCA), Fellow Hong Kong Certified Public Accountant (FCPA), Fellow Chartered Governance Professional (FCG), and Fellow Chartered Secretary (FCS). Mr. Wong was a member of the Asian Financial Forum's Steering Committee as well as the HKTDC Financial Services Advisory Committee from 2019 to 2023. Starting from May 2023, Mr. Wong started lecturing in Family Office Management Strategy at HKU SPACE.

Admission Requirements:

- 18 years old or above;
- Hold a higher diploma or associate degree awarded by a recognised institution;
- A relevant professional qualification would be an advantage in gaining admission.

Award:

- Certificate in Family Office Management will be awarded: fulfil the course and attendance requirements; or
- Attendance certificate will be issued: fulfil at least 70 % of attendance of the module.

Duration: 10 lectures (Total 30 hours)

Date and Time: 16, 20, 23, 27 & 30 Nov, and 4, 7, 11, 14 and 18 Dec 2023
Mon and Thu, 7:00-10:00p.m.

Medium of Instruction: English (supplemented by Cantonese)

Fees: HK\$13,000.00 (Full programme), HK\$5,000.00 (Module 1 / 2 / 3&4)

Points to Note

1. Applicants must be Hong Kong residents. The HK identity document(s) should be presented during application. No age limit is set for each module except stated otherwise, but applicants should fulfill the academic or professional requirements.
2. Please return the completed application form, in person or by post, to the Centre for Advanced and Professional Studies (CAPS) together with photocopies of your identity card, academic credentials and information relevant to your application.
3. The application deadline is usually 1 week before commencement of each module/ programme. Admission is on first-come-first-served basis.
4. The Institute reserves the right to decide whether an applicant is admitted or not, and holds the final decision to cancel a module/ programme in case of insufficient registration. If a module/ programme is cancelled by the Institute due to any reason, tuition fees paid will be refunded by crossed cheque.
5. Tuition fees paid will not be refunded in all cases unless the module/ programme is cancelled by the Institute. Upon registration, no change of class, transfer of fee or fees refund would be allowed.
6. Tuition fees can be paid by “EPS” or cheque. Please make the cheque payable to “Caritas Institute of Higher Education” and mark clear the applicant's name, course name and contact number at the back of the cheque. All receipts of tuition fee should be kept carefully. No replacement of receipt would be provided.
7. All classes take place as scheduled unless typhoon signal no.8 or Black Rainstorm Warning Signal is hoisted, or class cancellation is announced by the Education Bureau. Students have the responsibility to pay attention to announcements on the media during unstable weather.
8. The Institute will issue certificates of attendance or completion only to students who have attained 70% or above of the attendance.
9. The Institute reserves the right to alter class arrangements in case of special event or absence of tutors.
10. Unless with permission from the Institute, no recording activity is allowed in class. No sales or promotion activity is allowed unless authorised by “Caritas-Hong Kong”.
11. Information supplied by applicants will be kept in strict confidence. Applicants may check or amend their personal information on the application form if necessary. In the event that applicants fail to provide adequate information, the Institute may not be able to process their applications or offer any service.
12. For any enquiry, please contact us by phone at 3653 6700.

