香港銀行學會
The Hong Kong Institute of Bankers

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Wealth Management - Will, Trust and Life Insurance
財富管理 - 遺囑、信託與人壽保單

HKIB CPD
1.5 Hours

Objectives

- To introduce Will, Trust and Life Insurance
- To introduce common misconceptions on Will, Trust and Life Insurance
- To share cases in banking industry

Speaker

Mrs. Christine Koo, the principal partner of Christine M. Koo & Ip, Solicitors & Notaries LLP

- Over 30 years of experience in legal industry
- Lead a team of lawyers to assist in trusts and wealth management work

Seminar Outline

- Law of Succession 繼承法
- Testate and Intestate 有遺囑與無遺囑之異同
- Will and Life Insurance Policy 遺囑與壽險
- What is a Trust 甚麼是信託
- Role of Trust in Wealth Management 信託於財富管理的角色
- Trust and Life Insurance Policy 信託與壽險的關係
- Married Persons Status Ordinance《已婚者地位條例》(第182章第13條)

Who should attend

- Private Wealth and Retail Wealth Management Practitioners
- Practitioners from Banking and Financial Institutions
- Individuals, including students who are interested in Wealth Management

Seminar Details

Language:	Cantonese
Date:	17 August 2018 (Friday)
Registration:	3:00 p.m. – 3:30 p.m.
Seminar:	3:30 p.m. – 5:30 p.m.
Venue:	3/F, Guangdong Investment Tower, 148 Connaught Road Central
Fees:	**FREE** for HKIB members $200* for non-members *** 55th Anniversary Special Offer:** $200 registration fee waiver for joining HKIB Membership **(Enroll membership)**
Enrollment:	By Fax at 2544 9946 or By Email at: membership@hkib.org
Enquiries:	(852) 2153 7800 / 2153 7879

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The Hong Kong Institute of Bankers

Programme No: HP-M18-0801

Registration Form

Free Seminar
Wealth Management - Will, Trust and Life Insurance

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☐ A cheque / e-Cheque* made payable to "The Hong Kong Institute of Bankers" (Cheque no. ______________________)

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☐ Friends/Colleagues ☐ Banking Today ☐ HKIB Counter ______________________

Terms and Conditions

1. Confirmation will be sent to participants by email within 7 days prior to the course date.
2. Priority of enrolment will be given to Professional Members and on a 'first-come-first-serve' basis.
3. We reserve the right to reject an enrolment at any time.
4. We reserve the right to cancel, modify and/or postpone the course due to unforeseen circumstances.
5. Should you wish to apply for HKIB CPD Certificate, please download the "Application for Certificate of Attendance" and return to HKIB by fax (2544 9946) or email to membership@hkib.org. HK$30 adminstration fees will be charged.
6. The information given and personal data collected will be used for the purpose of administration and communication by the Institute.
7. For the Typhoon or Rainstorm arrangement, please refer to the confirmation email or HKIB's website (www.hkib.org).

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