

# IFPHK QRA SYMPOSIUM 2023

One of the QRA  
Designated  
CE Programs 2023

## Retirement Planning without Boundaries!

8 August 2023

03:00 PM to 06:00PM

(Including Networking Session with Speaker)



JC CUBE, Tai Kwun, 10 Hollywood Road,  
Central, Hong Kong



Medium of Instruction: Cantonese



Guest Speaker  
**Mr. Chris Tse, CFP®**  
Chairman  
IFPHK



Guest Speaker  
**Dr. David Pun, CTA, CFP®**  
Principal Consultant  
Acuvisions Corporate Strategy Ltd



Guest Speaker  
**Ms. Cindy Wong**  
**TEP, AEPP®, CTP, CEP®, MBA**  
Founder Director  
EPPLHK

**Limited seats available on a first-come  
first-served basis only for QRA Holders**

### Recognition

#### ★ 3 QRA Designated CE (2023) Hours

- 3 IFPHK CE Hours
- 3 SFC CPT Hours
- 3 MPFA Non-core CPD Hours

### PRICE

Standard Price: \$798 / person

35%  
Off

**Super Early Bird Discount: \$498 / person**  
(Register on or before 21 Jun)

[Register Now](#)

**Early Bird Discount: \$598 / person**  
(Register on or before 10 Jul)



\*\*Including one complimentary  
drink in networking session with speakers



Contact Us  
**2982 7867**



For More Information  
**www.ifphk.org**



ifphk.ce



IFPHK CE 專業進修



IFPHK CE Programs



# Speaker Profile

## Dr. David Pun

**CTA, CFP®**

**Principal Consultant**  
**Acuvisions Corporate Strategy Ltd**

Dr. David Pun has over 30 years of finance and taxation experience with heavy China orientation. His exposure spans across an array of industries including trading, manufacturing, retailing, fast moving consumer goods (FMCG) and information technology.

Dr. Pun currently serves as a consultant providing accounting & taxation, company secretarial services, tax planning, financial planning, wealth management and information system development in China and Hong Kong, as well as advising company on rules and compliance and taxation on cross-border transactions and local business operation. He is partner of a Certified Tax Advisor (Practising) firm in Qianhai. He also serves as professional trainer and mediator and is a part-time lecturer on PRC Tax at SCOPE of City University and Kaplan Financial Hong Kong. He is also partner lecturer of LiPace of Hong Kong Metropolitan University and CUSCS of the Chinese University of Hong Kong.



## Ms. Cindy Wong

**TEP, AEPP®, CTP, CEP®, MBA**

**Founder Director**  
**Estate Planning Practitioners (HK) Limited**

Cindy Wong has over 25 years of working experience spanning corporate banking, investment banking, financial planning, estate planning and trust advisory sectors. She is a TEP, a full member of the Society of Trust and Estate Practitioners (STEP) and has obtained the Certified Trust

Practitioner™ qualification from Hong Kong Trustees' Association. She is also awarded the designation of Associate Estate Planning Practitioner, jointly by Society of Will Writers UK and Estate Planning Practitioners Limited, Singapore.

Cindy is currently the Founder Director of Estate Planning Practitioners (HK) Limited, a company committed to the continuous upskilling of professionals in legacy planning in Hong Kong. She believes strongly in the importance of an integrative and collaborative ecosystem of estate, trust and financial practitioners to achieve holistic and practical solutions for the clients, enhancing the professionalism and competence of the industry.



# Event Rundown

**02:45 – 03:00 PM**

**Registration**



**03:00 – 03:30 PM**

**Mr. Chris Tse**

**Opening Remarks & IFPHK Retirement Survey Updates**

**03:30 – 04:05 PM**

**Dr. David Pun**

**Tax Implications for Individuals Holding Other  
Citizenships Retired in Hong Kong**

Tax planning for a retired person living in Hong Kong without other tax residency status are simple. Only limited sources in Hong Kong are taxable. But for someone with other tax residency status the case might be different. Taxation would be one of the important factors to be considered.

Government had introduced 3 insurance products for personal tax saving. By law, a tax payer would enjoy the tax saving on the payment for the insurance products not just for others. In practise this might not be applied in general to all tax payers.

In this session we are going to discuss how the tax residency status would determine the tax net of incomes earned after retirement. The second part will look into some practical cases on the payment of the 3 insurance products on how to effectively enjoy the tax saving.

**04:05 – 04:15 PM**

**Break Time**

**04:15 – 04:50 PM**

**Ms. Cindy Wong**

**Estate Planning - An Integral Component of Retirement  
Planning**

Estate planning and retirement planning are two distinct but interrelated aspects of financial planning that are essential to securing the financial future for you and your loved ones. Estate planning is in fact an integral component of retirement planning for individuals at all income levels but it is often put off to the last minute or completely overlooked.

Planning ahead for retirement involves saving and investing today to meet the retirement goals in the future which include, amongst others, lifestyle choices and medical care needs. Proper estate planning, on the other hand, ensures the safeguarding of the wealth accumulated to fulfil those goals in the event of mental incapacity, in addition to taking care of wealth transfer needs in the event of death.

In this session, we will discuss how retirement planning and estate planning when combined will help to form a holistic and robust financial plan, providing greater financial security for you and your loved ones.

**04:50 – 05:00 PM**

**Mr. Edwin Cheung**

**Closing Remarks & Photo Time**

**05:00 – 06:00 PM**



**Networking Drinks at Behind Bars / Foyer  
(Sponsor of Reception by FTLife)**