

## CPD Programme – New e-Learning Courses and Face-to-Face Seminars on Corporate Finance

The Institute continues to launch new e-Learning courses under the “e-Series” for participants to gain fundamental knowledge of specific subjects. Face-to-face seminars (“F2F seminars”) with tailor-made contents will be organized for participants to acquire more in-depth knowledge on the same subjects. The speakers are local subject experts with many years of solid professional lecturing experience.

	e-Series – Corporate Finance <small>(Note 1)</small>		F2F seminars <small>(Note 2)</small>		
	Topic/ Programme code	CPD hours	Topic/ Programme code	CPD hours	Speaker
Course 1	<b>SME Online Business with Digital Marketing Strategy Funding Assistance Scheme</b> (ESEREF02001)	1.5	<b>How Facebook and Instagram Can Work on the Omni Channel Digital Marketing Strategy with Government Funding Scheme</b> (SCPD17101801) Date: Wednesday, 18 October 2017 Time: 7:00 p.m. to 8:30 p.m.	1.5	<b>Mr. Ivan Fok</b> Business Development Director, Intimex Business Solutions Company Limited
Course 2	<b>Fundamentals of Share Repurchase Scheme for Accountants</b> (ESEREF01801)	1	<b>Practical Insights – True Rationale behind Share Repurchase of HK-listed Companies</b> (SCPD17102401) Date: Tuesday, 24 October 2017 Time: 7:00 p.m. to 8:30 p.m.	1.5	<b>Mr. Duncan Tang</b> Managing Director, iFinance (Asia) Limited
Course 3	<b>Mastering Intangible Assets Valuation</b> (ESEREF01901)	2	<b>Core of Business in the New Era: Value of Intangible Assets</b> (SCPD17112001) Date: Monday, 20 November 2017 Time: 7:00 p.m. to 8:30 p.m.	1.5	<b>Mr. Ferry Choy</b> CFA, ICVS
Course 4	<b>Understanding Banking Products for Accountants</b> (ESEREF01701)	1.5	<b>From a Banker’s Perspective: Do the Banking Products Really Suit Your Needs?</b> (SCPD17112801) Date: Tuesday, 28 November 2017 Time: 7:00 p.m. to 8:30 p.m.	1.5	<b>Mr. Duncan Tang</b> Managing Director, iFinance (Asia) Limited

**Note 1.** The e-Series e-Learning courses can be enrolled on a stand-alone basis. Click [here](#) for details.

**Note 2.** Persons who are interested in enrolling in the F2F seminar are required to enrol in the respective e-Series e-Learning course which provides foundation knowledge of the subject matter.





<b>Language</b>	Cantonese		
<b>Venue (for F2F seminars)</b>	Hong Kong Institute of CPAs, 27/F., Wu Chung House, 213 Queen's Road East, Wanchai, Hong Kong		
<b>Fee* (for each)</b>		<u>Course 1, 3 &amp; 4</u>	<u>Course 2</u>
	HKICPA member/ student:	HK\$360	HK\$290
	IA/ HKIAAT member/ student:	HK\$360	HK\$290
	Non-member:	HK\$635	HK\$530
	<i>*After a one-off special discount of HK\$20.</i>		
<b>Competency*</b>	Corporate finance		
<b>Rating*</b>	e-Series:	Foundation level	
	F2F seminars:	Mastery level	

\* Please refer to the [Institute's online CPD Learning Resource Centre](#) for descriptions of competency and rating.

## About the programme

### Course 1

e-Series	F2F seminar
 <b>SME Online Business with Digital Marketing Strategy Funding Assistance Scheme</b> (ESEREF02001) This e-Series course covers: <ul style="list-style-type: none"><li>• Web store platform setup</li><li>• Digital marketing strategy</li><li>• SME Export Marketing Fund (EMF)</li><li>• Retail Technology Adoption Assistance Scheme (ReTAAS) Fund</li><li>• Tips on applying for government funding</li></ul>	 <b>How Facebook and Instagram Can Work on the Omni Channel Digital Marketing Strategy with Government Funding Scheme</b> (SCPD17101801) Social media has become a powerful marketing tool but there are just too many social media platforms for digital marketers to work on brand building, so how should you get started? How to apply for government funding to work on online business with omni channel digital marketing strategy? Topics include: <ul style="list-style-type: none"><li>• Online business essential elements</li><li>• Micro-Moment – New concept for digital marketing</li><li>• Mobile search engine optimization and marketing</li><li>• Facebook marketing strategy</li><li>• Instagram marketing strategy</li><li>• Tips on applying for government funding</li></ul> After joining this seminar, participants will learn: <ul style="list-style-type: none"><li>• Facebook and Instagram marketing strategies</li><li>• How to apply for government funding to start up an IT project</li><li>• How to successfully implement a project with omni channel digital marketing strategy</li></ul>

## About the programme

### Course 2

#### e-Series



#### Fundamentals of Share Repurchase Scheme for Accountants

(ESEREF01801)

This e-Series course introduces:

- What is share repurchase?
- Various types of share repurchase schemes in HK:
  - On-market share repurchase
  - Off-market share repurchase
  - Share repurchase by "general offer"
- What are the true rationales behind share repurchase?
- What are the rules and regulations governing various share repurchase schemes and their implications?

#### F2F seminar



#### Practical Insights – True Rationale behind Share Repurchase of HK-listed Companies

(SCPD17102401)

Topics include:

- Unveiling true rationale behind the share repurchase scheme proposed by some of HK-listed companies
- What are the implications of share buy-back on controlling shareholders' level?
- Detecting red flags of some of share repurchase schemes
- Case study

**Completed**

After joining this seminar, participants will be able to:

- Understand various types of share repurchase schemes in HK
- Unveil the real motives behind share repurchase schemes
- Detect possible red flag signals of share repurchase schemes

Participants:

- Accountants and finance professionals who want to further understand share repurchase schemes and their implications for HK-listed companies

### Course 3

#### e-Series



#### Mastering Intangible Assets Valuation

(ESEREF01901)

This e-Series course introduces:

- What are intangible assets?
- What constitutes identifiable intangible assets under the accounting standards?
- Categories of intangible assets and their roles in business operations
- Introduction of the principles of common valuation methodologies for intangible assets

#### F2F seminar



#### Core of Business in the New Era: Value of Intangible Assets

(SCPD17112001)

Topics include:

- How important are intangible assets in your balance sheet?
- What kinds of intangible asset can be recognized under the prevailing accounting standards?
- Case studies – Valuation methodologies for intangible assets: Multi-period Excess Earnings Method (MPEEM), Relief from Royalty (RFR) Method, With-and-without, etc

After joining this seminar, participants will get familiar with the principles of intangible asset valuation and the common methodologies in evaluating different types of intangible assets.



## About the programme

### Course 4

#### e-Series



#### **Understanding Banking Products for Accountants**

(ESEREF01701)

This e-Series course highlights:

- Trade finance products
- Corporate lending products
- Treasury products
- Cross border financing products

#### F2F seminar



#### **From a Banker's Perspective: Do the Banking Products Really Suit Your Needs?**

(SCPD17112801)

When bankers approach corporate borrowers (including SMEs), they will usually offer various banking products to their clients, including bilateral loans, syndications and OTC treasury derivatives products.

From banker and HKMA's regulatory perspectives, the suitability issue of banking products is an imperative lending decision. This seminar provides an insight as to the suitability for corporate borrowers from bank lender's perspectives.

Topics include:

- Review of different types of banking products offered by banks to corporate borrowers
- Nature and risk of each banking product
- Suitability of banking products for various types of corporate borrowers
- What are the key credit rationales behind the banks' credit approver?
- Case study

After joining this seminar, participants will be able to:

- Understand the underlying nature of major banking products and their suitability for various types of corporate borrower
- Unveil the key credit rationales of banks' credit approver for different types of banking products

Participants:

- Accountants and finance professionals who want to further understand key risks and benefits of various banking products and their suitability issues



Hong Kong Institute of  
**Certified Public Accountants**  
香港會計師公會

## About the speakers

**Mr. Ivan Fok**, Business Development Director, Intimex Business Solutions Company Limited

Mr. Fok has over 15 years of hands-on experience in e-commerce and business development. He has conducted seminars and delivered lectures, covering e-commerce and online marketing in universities, CPA Australia, YOT, TID, HKTDC, HKPC SME ONE and FHKI. He also successfully helped over 6,000 Hong Kong corporate clients with their e-commerce business by offering website development, online marketing and consultancy services.

**Mr. Duncan Tang**, Managing Director, iFinance (Asia) Limited

Mr. Tang has over 20 years of professional experience in corporate financing, credit and product risk analysis at various major US and European international banks, including BoA Merrill Lynch, UBS, RBS and BNP Paribas. He is currently the Managing Director of iFinance (Asia) Limited and previously a Vice President-Finance of a mainboard-listed company in Hong Kong.

Mr. Tang also has ample training experience at various professional institutes, international banks and investment banks. He is also an author of an investment book published in Hong Kong.

**Mr. Ferry Choy**, CFA, ICVS

Mr. Choy is currently the director at Flagship Consulting. He is an International Certified Valuation Specialist (ICVS), a professional license in business valuation issued by the International Association of Consultants, Valuators and Analysts (IACVA) and a CFA chartered holder.

Mr. Choy was the Chairman of Continuous Education for the IACVA Hong Kong Chapter providing business valuation training courses to its members.



**To confirm your CPD booking,  
just log on to "MyCPA" at  
<http://www.hkicpa.org.hk>**

## HKICPA Event Enrolment Form

### CPD Programme – New e-Learning Courses and Face-to-Face Seminars on Corporate Finance

Finance & Operations Department,

Hong Kong Institute of CPAs,

**37/F, Wu Chung House, 213 Queen's Road East, Hong Kong**

Payment & Enrolment Status Enquiry: 2287 7381  
e-mail: [finance@hkicpa.org.hk](mailto:finance@hkicpa.org.hk)  
Fax : 2893 9853

Course Information Enquiry:  
2287 7386 / 2287 7253  
e-mail: [cpd@hkicpa.org.hk](mailto:cpd@hkicpa.org.hk)

**FOR OFFICE USE**

**Deadline: 7 working days before the date of the programme**

**Please tick the appropriate box:**

		HKICPA/ IA/ HKIAAT member or student	Non-member
Course 1:	ESEREF02001 and SCPD17101804	HK\$360 <input type="checkbox"/>	HK\$635 <input type="checkbox"/>
Course 2:	ESEREF01801 and SCPD17102404	HK\$290 <input type="checkbox"/>	HK\$530 <input type="checkbox"/>
Course 3:	ESEREF01901 and SCPD17112001	HK\$360 <input type="checkbox"/>	HK\$635 <input type="checkbox"/>
Course 4:	ESEREF01701 and SCPD17112801	HK\$360 <input type="checkbox"/>	HK\$635 <input type="checkbox"/>

#### Personal Information

Name: (Mr./Mrs./Ms.) HKICPA membership no.: \_\_\_\_\_  
Organization: \_\_\_\_\_ Position held: \_\_\_\_\_  
Tel no: \_\_\_\_\_ Fax no.: \_\_\_\_\_ Email address: \_\_\_\_\_

Contact information is used solely for communication of this particular event, without update to your member profile.

#### Payment Method (Please tick the appropriate box)

<input type="checkbox"/> Cheque (no. _____) payable to "Hong Kong Institute of Certified Public Accountants" or "HKICPA" <sup>(7)</sup>														
<input type="checkbox"/> BOC HKICPA VISA <input type="checkbox"/> BOC HKICPA UnionPay card <input type="checkbox"/> Other VISA / MasterCard														
Card Number:										Card Expiry Date (MM/YY):				
Cardholder's Name (block letters):					Cardholder's Signature:					Date:				

Payment receipt will be sent to your email address provided above once the payment is confirmed.

- Notes:**
- Membership Status: **NP** = Non-Practising, **P** = Practising, **IA** = International Affiliate, **S** = Student, **HKIAAT** = HKIAAT Student or Member, **GAA** = GAA Passport holder, **NM** = Non-Member.
  - Confirmation of enrolment will be sent to you via email. You can check your enrolment status at "MyCPA" at [www.hkicpa.org.hk](http://www.hkicpa.org.hk). Unsuccessful enrolment will be notified with full refund.
  - NO ADMISSION TICKET will be issued. Please bring your HKICPA membership card or confirmation email for admission purpose.
  - All applications are on a first-come-first-served basis.
  - Application by fax will ONLY be accepted when payment is made by credit card. Cash is strictly not accepted. Please ensure all the particulars relating to payment are completed, otherwise the application cannot be processed. There is NO need to send in the enrolment form again if it has already been faxed to the Institute.
  - For credit card payment, the card should be valid with expiry date at least 1 month from the date of event.
  - Please issue SEPARATE CHEQUE for each event.
  - In normal circumstances, the event fee is non-refundable or non-transferrable upon receipt of payment by HKICPA. Should the event be cancelled or postponed due to unforeseen circumstances, refund will be made according to your payment method. For credit card payment, refund will be made directly to your credit card account. For cheque payment, refund will be mailed to your correspondence address.
  - All scheduled events will be cancelled and postponed to a date to be announced in the event of typhoon signal no. 8 or above or if a Black Rainstorm warning is hoisted. For details of bad weather arrangement for CPD programmes, please refer to the Institute's homepage.
  - The Institute reserves the right to change the venue, date, speaker or to cancel the event due to unforeseen circumstances.
  - No unauthorized audio or video recording is allowed at CPD events.

**Personal Data:** Your personal data collected from the enrolment process and administration of courses/events/activities will be used for the purpose of the administration of the course on which you are enrolled. Such data collected may be accessible by the Institute's officers, persons or committees processing the application and related matters. In addition, the Institute may use the collected data for statistical research and analysis. The Institute intends to use the personal data of your name, email address and correspondence address to inform you, where relevant, of members' benefits, goods, services, facilities and events organized or provided by the Institute or other organizations. Members and registered students may opt out of receiving such materials at any time by logging in via the following link <https://www.hkicpa.org.hk/en/members-area/comm-preference/>. Non-members may opt out of receiving such materials at any time by sending an email to the Institute at [privacyofficer@hkicpa.org.hk](mailto:privacyofficer@hkicpa.org.hk) or a letter to the Institute's privacy officer. For more information about the privacy policy of the Institute, please go to <http://www.hkicpa.org.hk/en/service-tools/privacy-policy/>.

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