



Wealth Management Series (January 2018)

The economic outlook of Hong Kong for 2018 will depend on the evolution of the global economy, especially those of the Mainland and the U.S., due to its highly externally-oriented nature. In this **Wealth Management** Series, economists or finance professionals will be invited to share their insights about the developments of the global and/or local markets and to advise how to manage wealth strategically facing the relevant uncertainties.

Topic/ Programme code	Date and Time	Speaker
Global Asset Management in 2018 (SCPD18013101)	Wednesday, 31 January 2018 7:00 p.m. – 8:30 p.m.	Mr. Mark To Managing Director of Asset Management, Wing Fung Financial Group

Venue Hong Kong Institute of CPAs,
27/F., Wu Chung House, 213 Queen's Road East, Wanchai, Hong Kong

Format Seminar

Language Cantonese

Fee HKICPA member or student: HK\$190 (online enrolment: HK\$180)
IA/ HKIAAT member or student: HK\$190
Non-member: HK\$330

Participants Persons who want to know more about global and local economic developments and their implications

Competency* Industry knowledge; Risk management

Rating* Mastery to leadership level

CPD hours 1.5

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



About the programme

Global Asset Management in 2018 (SCPD18013101)

Course outline

The speaker will provide assessment of market forecasts for 2018 with reference to major asset classes.

After joining this seminar, participants will learn about:

- Analytical framework for asset management from a global macro fund perspective
- The latest economic trends and asset prices patterns

Speaker

Mr. Mark To, Managing Director of Asset Management, Wing Fung Financial Group

Mr. To is famous for his analytical rigor, rich experience and deep insights in global macro investing.

Mr. To graduated from the Chinese University of Hong Kong with a Bachelor of Social Science degree in Economics, with a focus on rise and fall of financial bubbles and crises in global markets. He earned his Master of Economics degree from the University of Hong Kong with a thesis on Hong Kong and mainland Chinese stock exchanges disclosures systems and testable implications for behavioral finance trading strategies.

Prior to his current role, Mr. To was the Associate Director (Asset Management) of Prudential Brokerage. Since October 2010, he has created and maintained a model portfolio for iMoney magazine and tailor made it for small retail investors with the constraints of minimum risks and minimum number of trading decisions. The portfolio has beaten the Hang Seng Index for corresponding period for several tens of percentage points (currently around 60pp). He was named the Best Analyst on Hong Kong stock strategies in 2014 by CNFOL, a popular finance portal in mainland China.



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<http://www.hkicpa.org.hk>**

HKICPA Event Enrolment Form (For Support Programme)

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
Fax : 2893 9853

Course Information Enquiry:
2287 7386 / 2287 7253
e-mail: cpd@hkicpa.org.hk

FOR OFFICE USE

Deadline: 7 working days before the date of the programme

No.	Membership		Full Name of Participant(s) (Block Letters)	Company	Email address ⁽²⁾ (Block Letters)	Programme Code	Fee (HK\$)
	No.	Status (1)					
1							
2							
3							
Total (HK\$)							

☐ I am unemployed and not working. I am planning to rejoin the workforce.

The Institute reserves the right to allocate places to enable the enjoyment of more members in this event.

The Institute's decision is final. Applicant must submit the enrolment form 10 working days before the event.

Contact Person : _____ Tel No. : _____ Fax No. : _____ E-mail : _____

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" ⁽⁷⁾											
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- 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. 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 unforeseeable 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.

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