



Managing MPF Schemes with MPF Performance Index and Confidence Index

Program Code: SCPD18121701

Over the years the government and the industry have devoted much effort to strengthening MPF's function in retirement protection and advocating financial literacy among members. From employer and employee perspectives, by what means can they evaluate the overall performance of their MPF schemes and individual investment performance? What are the employees' perception, behavior and expectation towards MPF? How can MPF Performance Index and Confidence Index serve as benchmarks to help corporates manage their MPF schemes?

This seminar will cover:

- Results of the 7th MPF Management and Confidence Survey 2018
- Implications behind the development trends of employees' behavior, knowledge, confidence in and expectations of MPF as retirement protection
- Methodology and compilation of the Gain Miles MPF Performance Index – an indicative reference benchmark for MPF fund performance
- Challenges faced and possible solutions when formulating the index
- Case study on evaluating employee overall MPF investment return at corporate level

Date **Monday, 17 December 2018**

Time 7:00 p.m. – 8:30 p.m.

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\$150
IA/ HKIAAT member or student: HK\$150
Non-member: HK\$330

Speakers **Dr. Gloria Siu**, Chief Executive, Gain Miles Group
Mr. Michael Chan, Managing Director, Gain Miles Group
(Speakers' profiles are printed overleaf)

Participants Professionals who wish to gain MPF industry related knowledge

Competency* Industry knowledge

Rating* Intermediate level

CPD hours 1.5

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

About the speakers

Dr. Gloria Siu, Chief Executive, Gain Miles Group

Dr. Siu has over 20 years of experience in the insurance industry; expertise on all industry aspects including corporate pension, employee benefits, general insurance and financial planning, from operations to business development; individuals to corporations. With the aim to increase public awareness on MPF and retirement, Dr. Siu led the Gain Miles Research Team to conduct MPF focused studies and publish findings every year. Holding her belief in active management and continuous education, more than 300 seminars on various MPF development topics were conducted and the unique corporate solution – Pension Advisory Model was developed. Dr. Siu is also in great interest to the healthcare development in Hong Kong. Her research focuses on employment based health insurance value and efficiency.

Dr. Siu is a member of the standing Advisory Committee of Investor Education Centre (IEC) and Investigation Panel of HKICPA appointed by the Financial Services and the Treasury Bureau since Year 2017. Dr. Siu holds an MBA from the University of Leicester, UK and a business administration doctorate degree from The Hong Kong Polytechnic University.

Mr. Michael Chan, Managing Director, Gain Miles Group

Mr. Chan is responsible for the development of strategy to drive healthy and steady growth of Gain Miles Group.

He has over 30 years of international life insurance and wealth management experiences. He took on a number of management positions in a reputable multi-national life insurance and wealth management company for more than 17 years, where he had worked as a product line manager of life and medical insurance products. He was the CEO of a public listed company in Malaysia until he joined Gain Miles in 2013.

Mr. Chan was the Chairman of the Board of the Medical Insurance Association of the Hong Kong Federal of Insurers from 1999 to 2000 and the first Chairman to publish the Medical Insurance Claim Statistical reference report. He is a fellow Member of the British Royal Chartered Institute of Management Accountants, Associate Member of HKICPA, qualified member of the society of Registered Financial Planners and Life Insurance Management Research Association and he holds an Accounting Degree from the Hong Kong Polytechnic University.



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