



Technology & Innovation Series

## Evaluation platform and audit analytics solution

(Programme Code: EWEB24121001)



The Institute continues to curate discounts for technology-related solutions and services to support small and medium practices (SMPs) in their digital transformation journey. A lunch webinar will be hosted by the Institute to introduce special discounts for members on an evaluation platform and an audit analytics solution offered by BDO and Wolters Kluwer, respectively. This webinar will help members understand how these solutions can improve SMPs' operational efficiency.

### Webinar outline

- **Session 1: 1:00 p.m. – 1:30 p.m.**

#### **BDO**

BDO Discover is an online evaluation platform designed to simplify the process of assessing the value of business and/or financials, as well as evaluating assets and liabilities for financial reporting purposes. It empowers SMPs with digital assessment tools and access to live market data, offering a speedy and cost-effective approach to evaluating financial data. It also assists in performing high-level due diligence and health checks on businesses.

- **Session 2: 1:30 p.m. – 2:00 p.m.**

#### **Wolters Kluwer**

TeamMate® Audit Analytics is a computer-assisted audit tool designed to support firm's transformation and streamline the audit process. This innovative solution delivers data-driven insights, empowering auditors with powerful analytics. It helps users to enhance audit planning, identify high-risk items across entire data sets (not just samples), and achieve more reliable results. It features a library of over 150 tests, simplifying data preparation and automating audit workflows.

#### **Speakers**

##### **Mr. Eric Pat**

Director of BDO Financial Services Limited

##### **Mr. David Chan**

Principal of BDO Financial Services Limited

##### **Mr. Samuel Tsang**

Solutions Manager, CCH® Professional Accounting Software  
Wolters Kluwer Hong Kong Limited

##### **Mr. Charlie Chan**

Senior Product Manager, Tax & Accounting  
Wolters Kluwer Hong Kong Limited

#### **Date & Time**

**Tuesday, 10 December 2024**

1:00 – 2:00 p.m.

#### **Format**

Webinar

#### **Language**

Cantonese

<b>Fee</b>	Complimentary
<b>Rating*</b>	Foundation to intermediate level
<b>Enrolment Deadline</b>	8 December 2024 (online)
<b>Registration</b>	Enrol online and the enrolment will be accepted on a first-come-first-served basis.

\* Details of [Competency and Rating](#) information

## About the Speakers

Session 1 – BDO: 1:00 p.m. – 1:30 p.m.



**Mr. Eric Pat**  
**Director of BDO Financial Services Limited**

Eric has over 20 years of experience in financial advisory services including valuation, due diligence, and litigation support and computer consulting.

He leads a team that specializes in valuation and financial due diligence. He has reviewed valuations of businesses, property, plant and equipment, purchase price allocation, financial instruments and intangible assets for listed groups and multinational corporates in different industries in Hong Kong and China for the purposes of financial reporting, transaction support, accounting impairment and litigation support. He has also led due diligence and financial/IT review assignments in Hong Kong and China, serving both private equity and commercial clients.

Eric is a member of HKICPA, holder of CMA, CFF, MRICS as a RICS Registered Valuer and CFA.



**Mr. David Chan**  
**Principal of BDO Financial Services Limited**

David has over 10 years of related experience in due diligence.

He led different project teams to conduct or review valuations for clients regarding business, property, plant and equipment, purchase price allocation and various financial instruments, including share options, investments and convertible preferred stocks. He has served clients in China, Hong Kong and Singapore involving different sectors including coal mines, printing, construction, interior design, retail, software and financial institution.

He has also conducted a number of due diligence exercises and merger & acquisition advisory services over the years for clients in APAC, UK and Europe region.

David is a member of HKICPA, CFA and FRM.



**Mr. Samuel Tsang**  
**Solutions Manager, CCH® Professional Accounting Software**  
**Wolters Kluwer Hong Kong Limited**

Samuel is the Solutions Manager at Wolters Kluwer Hong Kong Limited. Samuel has extensive experience in advising CPA Firms of all size in the region to digitalize their audit team and practice with Wolters Kluwer's Expert solutions for Professional Accountants (i.e., CCH® ProSystem® fx Engagement, CCH® iFirm etc.). Samuel has over 15 years of experience in the technology industry and business process outsourcing (BPO).



**Mr. Charlie Chan**  
**Senior Product Manager, Tax & Accounting**  
**Wolters Kluwer Hong Kong Limited**

Charlie is the Senior Product Manager, Tax & Accounting at Wolters Kluwer Hong Kong Limited. He oversees the development of the company's Tax & Accounting related products, including the cloud-based Tax & Accounting research platform and other digital solutions for Accounting, Legal and Company Secretarial professionals. He has extensive experience in advising CPA firms and professional bodies in digital transformation and has a combination of over 10 years of experience in the accounting and the technology industry. Charlie is a Project Management Professional and a Certified ESG Analyst.

## Disclaimer

- Participants are reminded that there are a wide range of products, services and technology solutions available in the market.
- Participants should carry out their own research and obtain independent advice before subscribing any products, services or technology solutions.
- The Hong Kong Institute of Certified Public Accountants (HKICPA) does not endorse or recommend any products, services or technology solutions and is not responsible to any loss or damage arising from using such products, services or technology solutions.
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