



Practice Management Series for SMPs

(April 2026)



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

Practice Management Series for SMPs



Run yearly since 2018, this series of seminars on practice management aims to help practitioners from small and medium practices (SMPs) better prepare for the challenges and opportunities ahead, adapt to changes, improve their management and operational efficiency, as well as to support their sustainability and future success.

Topic (Programme code)	Date and time	Speaker(s)
Succession and exit planning for CPA firms – practical concerns (Event code: OTHR26043001)	Thursday, 30 April 2026 6:30 p.m. – 8:00 p.m.	Panellists Mr Manfred Shiu Director, Diligent Capital Limited Mr Nathan Wong Partner, Haldanes Moderators Mr Frank Lam Deputy Chairman, Small and Medium Practices Committee (SMPC) Mr Parco Wu Member, SMPC

Language	Cantonese (with presentation materials in English)
Format	Face-to-face
Fee (for each session)	HKICPA member or student or IA: HK\$160 Non-member: HK\$360
Participants	Partners; Managers; Supervisors
Competency*	Business Planning and Strategy, Change Management
Sub-competency*	Developing and implementing strategic actions, Communicating, managing and evaluating strategic plans, Developing plans, evaluating and managing change initiatives, Executing and supporting change initiatives
Rating*	Intermediate to advanced level
CPD hours (for each session)	1.5

About the programme

Practice Management Series for SMPs – Succession and exit planning for CPA firms – practical concerns (Event code: OTHR26043001)

Course outline

This seminar will cover the critical financial, practical, and legal considerations involved in transferring or acquiring CPA firms. Speakers will share essential insights and actionable tips to help members who are planning for ownership succession, whether looking to take over an existing firm or transition out of their own, navigate the process with greater confidence and preparedness.

Panellists



Mr Manfred Shiu

Director
Diligent Capital Limited

Mr Manfred Shiu Shu Ming, aged 55, graduated from the City University of Hong Kong with a bachelor's degree in accountancy and completed his professional training at Coopers & Lybrand, and is a member of the Hong Kong Institute of Certified Public Accountants. Mr Shiu has over 25 years of experience in corporate finance, specialising in mergers, acquisitions, and restructuring of private and public companies, Pre-IPO investments and fundraising, Initial Public Offerings ("IPO"), and fundraising activities across various ventures and projects. His transaction portfolio spans private entities, China state-owned enterprises ("SOE"), and publicly listed companies in Hong Kong, Mainland China, Malaysia, Singapore, and Indonesia. Mr Shiu is currently the director of Diligent Capital Limited and is actively involved in Hong Kong's Capital Market.



Mr Nathan Wong

Partner
Haldanes

Mr Wong is a Partner at Haldanes specializing in commercial law and finance-related regulatory matters.

He is a Solicitor Advocate, holding higher rights of audience before all Hong Kong courts, and a Fellow of the Association of Chartered Certified Accountants (FCCA). This dual-professional status in law and accountancy allows him to bridge the gap between complex legal frameworks and the technical financial standards when handling intricate commercial matters.

Nathan offers extensive experience advising on the structural and legal nuances of the business succession. His practice extends across the lifecycle of a business entity, including resolving deadlocks, buy-outs, restructuring and contentious winding-up petitions.

Moderators



Mr Frank Lam

Council Member
Deputy Chairman, SMPC
Hong Kong Institute of Certified Public Accountants (HKICPA)
Director - Assurance Services
Leader of Family Office
BDO Limited

Frank is the Director of Assurance Services and Leader of Family Office of the BDO Limited.

Frank has over 25 years of audit experience with listed and initial public offering (IPO) clients operating in a variety of industries including manufacturing, retail business, property development, real estate agency, biotechnology, natural resources, media and entertainment, infrastructure and IT industries. He worked for large international accounting firms and had financial management experience in commercial sector.

Frank has wide-ranging experience on both Hong Kong and Mainland China auditing and accounting standards, and tax regulations as well as provision of financial and family office services to high net worth individuals and entrepreneurs. He also has extensive exposure on IPO and pre-IPO as well as merger & acquisition exercises in Hong Kong, Mainland China, Southeast Asia, Europe and United States of America.

Frank is a frequent event and course speaker of IPO and accounting and family office services topics and actively serves in professional body organisations.

Current and past professional/public appointments

- Council Member of the HKICPA
- Deputy Chairman of Small and Medium Practices Committee of the HKICPA
- Member of Registration Committee of the HKICPA
- Member of Financial Monitoring Committee, Reading Dreams Charity Fund (Hunan Province Education)
- Past President of Institute of Accountants Exchange

Qualifications and professional affiliations

- Fellow of the Hong Kong Institute of Certified Public Accountants (Practising)
- High-level Finance and Accounting Talent Quality Improvement Project by the Ministry of Finance - First Cohort of Hong Kong Graduate



Mr Parco Wu

Council Member
Member, SMPC
HKICPA
Founder
PW CPA & Co

Mr Wu has over 20 years of experience in auditing, accounting and financial reporting. He founded PW CPA & Co., a CPA firm in Hong Kong since 2016, where he is responsible for the management of the firm and reviewing audit engagements.

Mr Wu has also been the Council member of the Society of Chinese Accountants and Auditors (“SCAA”) since 2018 and he became the President of SCAA consecutively in both 2022 and 2023. He has also played an important role in reflecting the suggestions and comments from the accounting profession and businesses in Hong Kong to various relevant stakeholders and government authorities over the years.



CPD EVENT ENROLMENT FORM

(The enrolment form must reach the Institute no later than 2 working days before the start of the event.)

Please send the complete form **by e-mail** or **by post** together with the required payment

Email: enrolment@hki CPA.org.hk

By post: **HKICPA, 37/F, Wu Chung House, 213 Queen's Road East, Wanchai. Attn: F&O Dept.**

Payment & Enrolment Status Enquiry: 2287 7381 / enrolment@hki CPA.org.hk	Course Information Enquiry: 2287 7253 / cpd@hki CPA.org.hk	FOR OFFICE USE
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Section 1 – Personal Particulars where appropriate. All fields are mandatory unless specified otherwise.

Membership No.: _____, or please specify: Non-member GAA Passport Holder

Name of participant: _____ Organization: _____
Family name Given name (optional)

Contact information provided below is used solely for communication of the particular event(s), without update to your member profile.

Mobile: _____ E-mail: _____

Section 2 – Event Registration All fields are mandatory.

No.	Event code	Event name	Fees
1.			HK\$
2.			HK\$
3.			HK\$
Total:			HK\$

Section 3 – Payment Please fill in either 3A or 3B and where appropriate. All fields are mandatory in either part.

3A	<input type="checkbox"/> Cheque (No. _____) payable to HKICPA or Hong Kong Institute of Certified Public Accountants		
	<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:	Cardholder's Signature:	Date of completing the form:

Complete this part only if "Support Programme" applies:

3B	<input type="checkbox"/> I am unemployed and not working. I am planning to rejoin the workforce.	Date:	
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Note:

- 3.1 Applications will only be accepted when payment is made by cheque or credit card. Cash is strictly not accepted.
- 3.2 For cheque payment, please issue separate cheque for each event. For credit card payment, the card should be valid with expiry date at least 1 month from the date of event.
- 3.3 In order not to delay the process, please ensure payment is made together with your application.
- 3.4 Payment receipt will be sent to your email address provided above once the payment is confirmed.
- 3.5 In normal circumstances, the course fee is non-refundable or non-transferrable upon receipt of payment by HKICPA. Should the course be cancelled or postponed due to unforeseeable circumstances, refund will be made according to your payment method. Unsuccessful enrolment will be notified with full refund. 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.
- 3.6 Members of HKICPA may access to "MyCPA" to check your enrolment status.

Section 4 – Points to Note

- 4.1 Applications are processed on a first-come, first-served basis.
- 4.2 Confirmation of enrolment and login information to access the event (if applicable) will be sent to you via email. Your login ID and password are for your exclusive use ONLY and you should not share them with anyone.
- 4.3 In the event of typhoon signal no. 8 or above or a Black Rainstorm warning is hoisted, all scheduled events will be cancelled/postponed. Further details of bad weather arrangement for CPD programmes, please refer to the Institute's homepage.
- 4.4 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. The provision of personal data by means of this form is voluntary. However, insufficient information may result in an inability to process your application. 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://mas.hki CPA.org.hk/mycpa/communication/preference>. Non-members may opt out of receiving such materials at any time by sending an email to the Institute at privacyofficer@hki CPA.org.hk or a letter to the Institute's privacy officer. For more information about the privacy policy of the Institute, please go to <https://www.hki CPA.org.hk/en/Tools/Privacy-policy>.
- 4.5 No unauthorized audio or video recording is allowed at CPD events.
- 4.6 The Institute reserves the right to amend the above terms and conditions without prior notice, and to change the venue, date, speaker or to cancel the event due to unforeseen circumstances. In case of any disputes, the Institute reserves the right to make the final decision.

For payment by cheque, please fill-in your postal address for refund.	
Name:	Name:
Address:	Address: