

Co-organized by:



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



The Hong Kong  
Institute of Bankers  
香港銀行學會

## Winning the Deal: Negotiation Skills for Bankers and Corporate Finance Professionals

**A Valuable Opportunity to Connect  
with Banking Professionals**

Programme Code:

SCPD26072301 (Face-to-face)

EWEB26072302 (Live webinar)

**HYBRID  
SEMINAR**

The Hong Kong Institute of Certified Public Accountants (HKICPA) and The Hong Kong Institute of Bankers (HKIB) proudly present our joint event — a landmark collaboration specifically designed for CPAs, Bankers, and Corporate Finance Professionals.

This hybrid forum features co-curated strategic content, prestigious keynote speaker, and high-caliber participants who are actively shaping the financial ecosystem. For in-person attendees, the evening includes complimentary refreshments and a cross-industry networking session, offering an exclusive opportunity to forge valuable connections with HKIB members and fellow leaders.

Register today to gain a distinct insight from leaders driving the industry forward.

### **Strategic Deal Mastery**

- Master the full negotiation lifecycle – from preparation to execution. Learn to balance corporate objectives, risk appetite, and institutional policy while structuring creative deal terms (earn-outs, contingent payments, financing arrangements) that deliver sustainable, mutually beneficial outcomes.

### **Stakeholder & Investor Alignment**

- Navigate complex multi-party dynamics involving boards, shareholders, regulators, and lenders. Acquire proven techniques to align competing interests, manage divergent agendas, and build consensus – while cultivating relationship capital through transparency and integrity.

### **Executive Networking & Peer Exchange** *(Exclusive to in-person attendees)*

- Engage with CPAs, senior banking practitioners, and corporate finance leaders in a dedicated post-seminar networking session over refreshments. Exchange deal insights, forge cross-sector connections, and expand your professional network within the combined HKICPA-HKIB community.


**EVENT RUNDOWN:**

6:30 p.m.	<p><b>Registration</b>          For face-to-face attendees only</p>
7:00 p.m. – 8:30 p.m.	<p><b>Presentation</b></p> <p>Winning the Deal: Negotiation Skills for Bankers and Corporate Finance Professional</p> <ul style="list-style-type: none"> <li>• Decode the Bank's Credit Approval Process: What Happens Behind the Scenes</li> <li>• Match Corporate Finance Needs to the Right Banking Products</li> <li>• See the Deal Through the Credit Approver's Lens</li> <li>• From Negotiation to Legal Documentation: Building Credit Worthiness Step by Step</li> <li>• Case Study</li> </ul> <p><b><u>Speaker</u></b></p> <p><b>Mr. Duncan Tang</b>          Managing Director, iFinance (Asia) Limited</p> <p>Mr. Tang has over 20 years of experience in corporate finance and risk management field in leading international US and European corporate and investment banking. He possesses extensive experience in corporate finance for pre-IPO companies and fund-raising activities for Hong Kong listed companies through network of leading international investment and corporate banks. With a strong background in credit risk, he is extremely familiar in banking products, including both loan and treasury products.</p> <p>In addition, Mr. Tang specializes in arranging banking facilities, both bilateral or syndicated, matching the funding needs of listed corporates (midcap or blue chips) in Asia.</p> <p>Currently, Mr. Tang is a Director of a Hong Kong-listed company.</p>
8:30 p.m. – 9:00 p.m.	<p><b>Networking</b>          For face-to-face attendees only</p> <p>An opportunity to connect with banking practitioners, gain industry insights and exchange experiences over drinks and light refreshments.</p>

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## EVENT DETAILS:

### DATE & TIME:

**23 July 2026 (Thursday)**

7:00 p.m. – 9:00 p.m.

### VENUE (For face-to-face session):

**Hong Kong Institute of CPAs**

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

### FORMAT:

Seminar with both face-to-face and live webinar format

*(Webinar participants will receive an email confirmation with access details for tablet, smart phone or PC.)*

### LANGUAGE:

Cantonese

### CPD HOURS:

1.5

### FEE:

HKICPA member, student or IA: HK\$380\*\*

Non-member: HK\$600

*\*\*Achieve full attendance to receive a \$100 discount coupon for future selected HKICPA courses.*

### PARTICIPANTS:

Corporate bankers; finance professionals, credit specialists who need to negotiate lending terms, balance client needs with institutional policies as part of their professional role

### COMPETENCY\*:

Interpersonal Skills, Investor Relations

### SUB-COMPETENCY\*:

Communication skills, presentation skills, influencing and negotiation skills, networking skills

### RATING:

Intermediate

### ENQUIRIES:

**Ms. Katelyn Chan**

Tel: 2887 7057

Email: [katelynhlchan@hkicpa.org.hk](mailto:katelynhlchan@hkicpa.org.hk)

\* Please refer to the [competencies and ratings for CPD events](#).



## 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](mailto: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 / <a href="mailto:enrolment@hki CPA.org.hk">enrolment@hki CPA.org.hk</a>	Course Information Enquiry: 2287 7253 / <a href="mailto:cpd@hki CPA.org.hk">cpd@hki CPA.org.hk</a>	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.

<b>3A</b>	<input type="checkbox"/> Cheque (No. _____) payable to <b>HKICPA</b> or <b>Hong Kong Institute of Certified Public Accountants</b>		
	<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.**

<b>3B</b>	<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](mailto: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: