



Practice Management Series for SMPs (April – August 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.	Panelists 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
Regulatory Landscape in the Accounting Profession (Event code: OTHR26063001)	Tuesday, 30 June 2026 6:30 p.m. – 7:30 p.m.	Speakers Ms Janey Lai Chief Executive Officer, Accounting and Financial Reporting Council (AFRC) Ms Venus Kong Director, Policy, Registration & Oversight, AFRC Moderator Mr Parco Wu Member, SMPC
Building the Tech-Driven Practice (Event code: EWEB26082501)	Tuesday, 25 August 2026 1:00 p.m. – 2:00 p.m.	Panelists Mr Andy Lam Managing Consultant, Lontreprise Consulting Limited

		Ms Winnie Leung Founder and CEO, WYNI Technology Limited Mr Timothy Tang Partner, William Lee, Paul Tang & Co. Moderator Mr Parco Wu Member, SMPC
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Language	Cantonese (with presentation materials in English)
Format	Face-to-face or Live webinar
Fee (for each session)	HKICPA member or student or IA: HK\$170 Non-member: HK\$370 <i>(For live webinar: a reminder email will be sent to you closer to the event date, which will include a login ID and password. You may access the webinar by tablet, smart phone or PC.)</i>
Participants	Partners; Managers; Supervisors
Competency*	Business Planning and Strategy, Change Management, Corporate Governance, Information Technology
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, Compliance with legal & regulatory requirements and CG best practice, Technology-related upgrades and implementations
Rating*	Intermediate to advanced level
CPD hours	Succession and exit planning for CPA firms – practical concerns: 1.5 hours Regulatory Landscape in the Accounting Profession: 1 hour Building the Tech-Driven Practice: 1 hour

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 and SMPC Practice Management and Digitalization Support Group
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.

Other current appointments:

- Chairman, Sports and Recreation Committee, HKICPA
- Member, Professional Development Committee, HKICPA

About the programme

Practice Management Series for SMPs: Regulatory Landscape in the Accounting Profession (Event code: OTHR26063001)

Course outline

This seminar will provide an in-depth exploration of the regulatory landscape for the accounting profession, with a specific focus on SMPs in Hong Kong. Featuring direct insights into the AFRC's oversight, the session will cover the AFRC's risk-based inspection approach, including brief reminders on changes to the inspection approach; practical considerations for audits involving cross-border engagements; supporting SMPs in enhancing professional standards and meeting evolving regulatory expectations; and key compliance reminders, including auditing corporate practices and registration matters, etc.

Speakers



Ms Janey Lai
Chief Executive Officer
AFRC

Ms Janey Lai is the Chief Executive Officer (CEO) and Executive Director of the AFRC since April 2024.

Ms Lai joined the AFRC in August 2022 as the Head of Inspection and took on the additional role of Acting CEO in October 2023.

With decades of experience in the Chinese Mainland and Hong Kong, her background includes auditing, talent development, and business transformation.

Ms Lai has extensive knowledge of regulatory frameworks and cross-border compliance.

Before joining the AFRC, Ms Lai was a Partner of two leading international accounting firms for over 17 years. She has a Bachelor of Economics from the University of Sydney and is a fellow member of the Hong Kong Institute of Certified Public Accountants and CPA Australia.



Ms Venus Kong
Director, Policy, Registration & Oversight
AFRC

Ms Venus Kong is a Director of Policy, Registration, and Oversight at the AFRC, where she leads the oversight of specified functions performed by the HKICPA and drives the initiative to develop a sustainability assurance regulatory framework in Hong Kong. She also contributes to policy research related to auditing, financial reporting, and corporate governance. Before joining the AFRC, Ms Kong worked at an international accounting firm. She is a Certified Public Accountant and has extensive professional experience in providing auditing and continuing professional development services.

Moderator



Mr Parco Wu

Council Member

Member, SMPC and SMPC Practice Management and Digitalization Support Group

HKICPA

Founder

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- Member, Professional Development Committee, HKICPA

About the programme

Practice Management Series for SMPs: Building the Tech-Driven Practice

(Event code: EWEB26082501)

Course outline

The accounting landscape is undergoing a massive shift driven by artificial intelligence (AI) and automated digital solutions. Staying competitive requires moving beyond traditional methods.

This webinar will bring together industry practitioners and technology experts to discuss real-world insights on integrating digital solutions into daily operations, current AI use cases within the industry, and practical advice on how to effectively adopt new technologies. Participants will gain insights on how to leverage digital tools to elevate their practice and handle common implementation hurdles to evolve their firms.

Panellists



Mr Andy Lam

Managing Consultant
Lontreprise Consulting Limited

Lam Ying Hung, Andy has more than 35 years of experience in banking, accounting and logistics. He started his own consulting firm in 2005, specializing in financial consulting for pre-IPO and providing corporate services to Hong Kong and PRC companies.

Andy is an associate member of various professional organizations, namely Hong Kong Institute of Certified Public Accountants ("HKICPA"), Institute of Chartered Secretaries and Administrators, The Hong Kong Institute of Company Secretaries and The Hong Kong Institute of Bankers. Mr. Lam is also a fellow member of the Association of Chartered Certified Accountants. He is currently an Independent Non-Executive Director of 2 companies listed on the Main Board of the Hong Kong Stock Exchange. He received his Master of Professional Accounting and Master of Science in e-commerce for executives both from The Hong Kong Polytechnic University.

He is a wine lover and has travelled to Australia, Portugal and China to visit more than 100 vineyards.



Ms Winnie Leung

Founder and CEO
WYNI Technology Limited

Winnie Leung is a serial tech entrepreneur with over a decade of hands-on experience in AI, machine learning, and data science — disciplines now at the heart of digital transformation across industries. As Founder and CEO of WYNI Technology Limited, she has led the design and delivery of AI-driven solutions for financial institutions and government clients, helping organizations modernize operations, automate workflows, and unlock data-driven insights. Previously, she spearheaded AI initiatives at major financial firms, building systems for real-time decision-making. Winnie holds an MBA from The University of Hong Kong and is a frequent speaker and mentor across Hong Kong's education institutions and professional communities. Her practical expertise in digitalization makes her well placed to share actionable insights relevant to today's accounting and finance professionals.



Mr Timothy Tang

Partner

William Lee, Paul Tang & Co.

Timothy is a Hong Kong-based audit specialist who began his career in a Big Four accounting firm, developing strong capabilities in statutory audits and group reporting. Within his current firm, he has driven practical digitalization of internal audit workflows – including e-filing, documentation automation, and digital working-paper optimization – to enhance efficiency and compliance.

Moderator



Mr Parco Wu

Council Member

Member, SMPC and SMPC Practice Management and Digitalization Support Group

HKICPA

Founder

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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@hkipca.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@hkipca.org.hk

Course Information Enquiry:
2287 7253 / cpd@hkipca.org.hk

FOR OFFICE USE

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	☐ Cheque (No. _____) payable to HKICPA or Hong Kong Institute of Certified Public Accountants		
	☐ BOC HKICPA VISA ☐ BOC HKICPA UnionPay card ☐ 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	☐ I am unemployed and not working. I am planning to rejoin the workforce.	Date:	
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- Note:
- Applications will only be accepted when payment is made by cheque or credit card. Cash is strictly not accepted.
 - 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.
 - In order not to delay the process, please ensure payment is made together with your application.
 - Payment receipt will be sent to your email address provided above once the payment is confirmed.
 - 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.
 - Members of HKICPA may access to "MyCPA" to check your enrolment status.

Section 4 – Points to Note

- Applications are processed on a first-come, first-served basis.
- 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.
- 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.
- 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.hkipca.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@hkipca.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.hkipca.org.hk/en/Tools/Privacy-policy>.
- No unauthorized audio or video recording is allowed at CPD events.
- 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: