

## Financial Services Interest Group

### Cocktail Reception – A holistic approach to retirement planning



Hong Kong has the highest life expectancy in the world, with an average age over 80. This means that with a retirement age of 65, we have to support our post-retirement life of another 15 to 20 years. In general, people are well aware of the need to save for retirement and understand the “magic number” is a function of desired retirement lifestyle and number of years in retirement.

At the coming Financial Services Interest Group annual cocktail reception, Ms. Ka Shi LAU, BBS, Managing Director & CEO of BCT Group, will share her insights about a holistic approach to retirement planning, including other factors such as longevity and inflation risks. This is also an excellent opportunity to meet and exchange views with fellow CPAs in the new year.

Find out more about the event details below:

**Date & Time** **16 January 2017, Monday**

**Drink from 6:30 p.m. — 8:30 p.m.**

**Talk starts at 7:15 p.m.**

**Venue** HKICPA, 27th Floor, Wu Chung House,  
213 Queen's Road East, Wan Chai, Hong Kong.

**Guest speaker** **Ms. Ka Shi LAU, BBS**  
Managing Director & CEO  
BCT Group

**Topic** **A Holistic Approach to Retirement Planning**

**Fee** \$190 (HKICPA member)  
\$330 (non-HKICPA member)

**CPD hour** 1 hour

**Language** Cantonese

**Competency\*** Management, leadership and soft skills

**Rating** Foundation level – general awareness of competency

**Enrolment deadline** 11 January 2017

**Registration** **Enroll online** or complete the enrolment form and return it with full payment by the enrolment deadline.

Enrolments will be accepted on a first-come-first-served basis.



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



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#### ABOUT THE SPEAKER

**Ms. Ka Shi LAU, BBS**

Managing Director & CEO

BCT Group

Ms. Lau is the Managing Director & CEO of BCT Group (comprising BCT Financial Ltd (“BCTF”) and Bank Consortium Trust Co Ltd (“BCTC”)), a major MPF product provider and one of the largest trust companies in Hong Kong focusing on the provision of pension products, and asset servicing for investment funds and pensions.

Apart from her current role as the Vice Chairman of Hong Kong Trustees’ Association, Ms. Lau also serves in various statutory and professional bodies including the Mandatory Provident Fund Schemes Authority, Securities and Futures Commission (SFC), Financial Services Development Council, Hong Kong Retirement Schemes Association, Hong Kong Trade Development Council, SFC’s Investor Education Centre, Asian Corporate Governance Association, HKICPA, Institute of Financial Planners of Hong Kong, and The Hong Kong Institute of Directors (HKIoD). She also holds public service roles including the Minimum Wage Commission, the Independent Commission on Remuneration for Members of the Executive Council and the Legislature, and Officials under the Political Appointment System of the HKSAR, and Our Hong Kong Foundation’s “Business for Social Good” Platform.

Amongst various awards, Ms. Lau was awarded the “Bronze Bauhinia Star” (BBS) by the HKSAR Government. She is the first woman to receive the “Director of the Year Award” in the “Private Companies, Executive Director” category from HKIoD. She was also named “Professional of the Year” in the “Women of Influence Awards 2010” jointly organized by the American Chamber of Commerce in Hong Kong and South China Morning Post.



Event code: CKTL17011601

## FSIG Cocktail Reception – A holistic approach to retirement planning Enrolment Form

Finance & Operations Department,  
Hong Kong Institute of CPAs

37th Floor, Wu Chung House,  
213 Queen's Road East, Hong Kong.

Fax no: 2893 9853

16 January 2017  
(Enrolment deadline: 11 January 2017)

Confirmation of enrolment will be sent to you via email. You can check your enrolment status at "My CPA" at [www.hkicpa.org.hk](http://www.hkicpa.org.hk).  
Unsuccessful enrolment will be notified with full refund.

*[Contact information below is used solely for communication of this particular event, without update to your member profile]*

Please use BLOCK letters

Name (Mr./ Mrs./ Ms): \_\_\_\_\_ Membership no.: \_\_\_\_\_

Company: \_\_\_\_\_

Position: \_\_\_\_\_ Email <sup>(Note 4)</sup>: \_\_\_\_\_

Telephone no.: \_\_\_\_\_ Mobile no.: \_\_\_\_\_

(Please tick the appropriate box)

<b>Fee:</b>	<input type="checkbox"/> HKICPA Member: \$190	<input type="checkbox"/> non-HKICPA Member: \$330
<input type="checkbox"/> Cheque (no. _____) payable to "Hong Kong Institute of Certified Public Accountants" or "HKICPA"		
<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 (block letters):	Cardholder's Signature:	Date:
<ul style="list-style-type: none"> <li>For credit card payment the card should be valid with expiry date at least <b>1 month</b> from the date of event.</li> <li>Payment receipt will be sent to your email address provided above once the payment is confirmed.</li> </ul>		

### Notes:

- Enrolment for the activity is accepted on a first-come-first served basis.
- Full payment must be made before your enrolment will be processed. No telephone reservation will be accepted.
- Application by fax will ONLY be accepted when payment is made by credit card. Cash is strictly not accepted.
- Confirmation of enrolment will be sent to you via email before 13 January 2017. You can check your enrolment status at "MyCPA" at [www.hkicpa.org.hk](http://www.hkicpa.org.hk). Unsuccessful enrolment will be notified with full refund.
- In normal circumstance, the admission fee is non-refundable or non-transferrable upon receipt of payment by HKICPA. Should the event be cancelled or postponed due to unforeseen circumstance, refund will be made according to your payment method. 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.
- Bad weather arrangement:** When the typhoon signal no. 8 or above / black rainstorm warning is hoisted, as announced by the Hong Kong Observatory, at or after 2:30 p.m. on the date of event, the event will be cancelled.
- The Institute reserves the right to change the venue, date, speaker, and/or rundown of the event due to unforeseen circumstances.

**Personal Data:** 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/event/activity on which you are enrolled ("Event"). 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. By submitting this Enrolment Form, you understand and agree that the Institute may provide your personal data above to co-organisers/service providers in or outside Hong Kong for the purpose relating to the Event. 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://www.hkicpa.org.hk/en/members-area/comm-preference/>. Non-members may opt out of receiving such materials at any time by sending an email to the Institute at [privacyofficer@hkicpa.org.hk](mailto:privacyofficer@hkicpa.org.hk) or a letter to the Institute's privacy officer. For more information about the privacy policy of the Institute, please go to <http://www.hkicpa.org.hk/en/service-tools/privacy-policy/>.

**Payment & Enrolment Status Enquiry:** 2287 7379

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

**Event Information Enquiry:** 2287 7012 (Carolyn Cheung)

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

For non-member and firm payment by cheque, please fill in your postal address for refund in case the event is full or cancelled.

Name :	Name :
Address :	Address :