



## Practice Management Series for SMPs

(November - December 2022)



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 / Panellists
Retaining Talents in Hong Kong and Hiring Trends 2022 - 2023 (EWEB22110901)	Wednesday, 9 November 2022 12:30 p.m. – 2:00 p.m.	<p><b>Ms. Hayley Law</b> Associate Director, Michael Page International (Hong Kong) Limited</p> <p><b>Ms. Nicole Hui</b> Manager, Michael Page International (Hong Kong) Limited</p>
Putting the “Success” in Succession Planning (panel discussion) (EWEB22120902)	Friday, 9 December 2022 6:30 p.m. – 7:30 p.m.	<p><b>Hon Edmund Wong FCPA (Practising)</b> Legislative Council Member (Accountancy Functional Constituency) Chairman, Small and Medium Practices Committee (SMPC), Hong Kong Institute of Certified Public Accountants (HKICPA) Chairman, SMPC Working Group on Cooperation with Mainland SMPs, HKICPA</p> <p><b>Mr. Gary Poon CPA (Practising)</b> Deputy Chairman, SMPC, HKICPA Chairman, SMPC Working Group on Technical Issues, HKICPA</p> <p><b>Mr. Thomas Lee CPA (Practising)</b> Member, SMPC Working Group on Practice Management and Digitalization, HKICPA</p> <p><b>Mr. Jeffrey Chan FCPA (Practising)</b> (Moderator) Chairman, SMPC Working Group on Practice Management and Digitalization, HKICPA</p>

Stay tuned for further announcements of events from this series!

\* Please refer to the [Institute's online CPD Learning Resource Centre](#) for descriptions of competency and rating.

<b>Language</b>	Cantonese (supplemented with English for technical terms)
<b>Format</b>	Webinar
<b>Fee (for each session)</b>	HKICPA member or student or IA: HK\$160 Non-member: HK\$360 <i>(A confirmation email will be sent to you when your registration is accepted, which will include a login ID and password for the webinar. You may access the webinar by tablet, smart phone or PC.)</i>
<b>Participants</b>	Partners; Managers; Supervisors
<b>Competency*</b>	Business Planning and Strategy, Change Management, Information Technology
<b>Sub-competency*</b>	Developing and implementing strategic actions, Communicating, managing and evaluating strategic plans, Developing plans, evaluating and managing change initiatives, Executing and supporting change initiatives, Technology-related upgrade and implementations
<b>Rating*</b>	Intermediate to advanced level
<b>CPD hours (for each session)</b>	1.5 for (EWEB22110901) 1 for (EWEB22120902)

\* Please refer to the [Institute's online CPD Learning Resource Centre](#) for descriptions of competency and rating.

## About the programme

### Retaining Talents in Hong Kong and Hiring Trends 2022 – 2023 (EWEB22110901)

#### Course outline

With the pandemic forcing home life and work life into the same physical space for a significant period of time, a spotlight has been placed on how people view not only their work, but their lives as well in a more holistic manner. Employees are re-evaluating what constitutes quality work life, and they want it to be purposeful. According to recent findings, a significant 69% of respondents in Hong Kong are willing to accept a lower salary or forgo pay rise and/or promotion for better work-life balance, overall well-being and happiness.

Hong Kong as an international city thrives on having diverse talent in different corporates including small and medium sized practices (SMPs). In recent years, we have observed an increase in staff turnover among different industries as well as an exodus of talents who are seeking job opportunities in Singapore, London, etc.. Talent retention has thus become a hot topic.

In this seminar, Hayley and Nicole will talk about talent retention strategies including topics such as upward mobility, upskilling, flexibility, and diversity for SMPs in Hong Kong. The speakers will also talk about the hiring trends in different industries to help SMPs build a winning talent strategy for their company.

#### Speakers



**Ms. Hayley Law**  
**Associate Director**  
**Michael Page International (Hong Kong) Limited**

Ms. Law graduated from Economics and Finance at The University of Hong Kong. She began her first job at DBS as a Management Associate. Hayley is currently an Associate Director at Michael Page, responsible for recruiting middle to senior level personnel in Financial Services including Corporate and Investment Bank, Insurance, Securities firms, and the FinTech field (including Blockchain & Digital Assets).



**Ms. Nicole Hui**  
**Manager**  
**Michael Page International (Hong Kong) Limited**

Ms. Hui graduated from Global Business Studies at Chinese University of Hong Kong. She interned at Deutsche Bank and began her first job at Citi as an ICG Management Associate, rotating across Investment Banking, and Private Banking. Nicole is currently a Manager at Michael Page, specializing in the Accounting & Finance team. She is responsible for recruiting senior level personnel in listed companies.

## About the programme

### Putting the “Success” in Succession Planning (panel discussion) (EWEB22120902)

#### Course outline

Why is succession planning so important? There are many examples of organizations that experienced an unsuccessful transition after the departure of an executive leader.

To address these types of leadership challenges looming over organizations, succession planning is an effective strategy used by businesses and across industries.

To further help organizations in understanding the importance of succession planning and prepare them to undertake the process, speakers will share their experience on succession planning on the following topics in this panel discussion:

- The challenges faced during the succession process
- The value-added areas in accounting
- Options of succession planning
- Suggestions for CPA Practices on succession planning

#### Speakers



**Hon Edmund Wong FCPA (Practising)**  
**Legislative Council Member (Accountancy Functional Constituency)**  
**Chairman**  
**Small and Medium Practices Committee (SMPC), Hong Kong Institute of Certified Public Accountants (HKICPA)**  
**Chairman**  
**SMPC Working Group on Cooperation with Mainland SMPs, HKICPA**

Mr. Wong is currently Legislative Council Member (Accountancy Functional Constituency), and Chairman of the Small and Medium Practices Committee of the Institute, as well as Practising Director of Patrick Wong CPA Limited.

Mr. Wong is experienced in corporates services and practice management.



**Mr. Gary Poon CPA (Practising)**  
**Deputy Chairman**  
**SMPC, HKICPA**  
**Chairman**  
**SMPC Working Group on Technical Issues, HKICPA**

Mr. Poon is currently a Partner of Poon & Co. He specializes in serving clients in the financial, real estate and non-profit seeking sectors. He was appointed to be a member of the Financial Reporting Council Review Panel by the HKSAR Government and was a Council member of the Hong Kong Institute of Certified Public Accountants (“HKICPA” or “Institute”). He has served in various committees of the Institute including as Deputy Chairman of the Small and Medium Practices Committee and member of the Qualification and Examinations Board.

Mr. Poon is a practising member of the HKICPA, Chartered Financial Analyst, Certified Tax Advisor and member of several other professional accounting bodies in Canada, the U.S.A. and Australia.



**Mr. Thomas Lee CPA (Practising)**

**Member**

**SMPC Working Group on Practice Management and Digitalization, HKICPA**

Mr. Lee is a Partner of Lee, Au & Co. He has more than 20 years in the audit industry. He interned at Jardine Fleming (now JP Morgan) and began his first job at KPMG. He joined his father's audit firm in 2008. Since then, he and his father have partnered together to expand their business to other non-assurance sectors such as UK tax advisory, outsourced HR solutions, property agency and talent recruitment.

Mr. Lee graduated from Accounting and Finance at the University of Warwick and later obtained a second bachelor's degree in Chinese law at the Tsinghua University and Master of Business Administration at the Royal Holloway, University of London.

**Moderator**



**Mr. Jeffrey Chan FCPA (Practising)**

**Chairman**

**SMPC Working Group on Practice Management and Digitalization, HKICPA**

Mr. Chan is currently the Partner Audit of Grant Thornton Hong Kong Limited. He has more than 20 years' experience in serving companies operating in Hong Kong, mainland China and overseas markets. His clients cover a wide variety of industries including manufacturing, trading, shipping, property development, construction and retailing. He has been involved in various transaction support assignments.

Mr. Chan is a Certified Public Accountant (Practising), and is also a fellow of the Association of Chartered Certified Accountants and a fellow of the Hong Kong Institute of Certified Public Accountants.



**To confirm your CPD booking,  
 just log on to "My CPA" at  
<http://www.hkicpa.org.hk>**

## HKICPA Webinar Enrolment Form (For Support Programme)

Finance & Operations Department,  
 Hong Kong Institute of CPAs,  
**37/F, Wu Chung House, 213 Queen's Road East, Hong Kong**

Payment & Enrolment Status Enquiry: 2287 7381  
 e-mail: [enrolment@hkicpa.org.hk](mailto:enrolment@hkicpa.org.hk)

Course Information Enquiry:  
 2287 7253 / 2287 7230  
 e-mail: [cpd@hkicpa.org.hk](mailto:cpd@hkicpa.org.hk)

**FOR OFFICE USE**

**An email will be sent to you when your registration is accepted, which will include login details to the webinar.  
 You can access the webinar by tablet, smart phone or PC.**

No.	Membership		Full Name of Participant(s) (BLOCK Letters)	Company	Email address <sup>(2)</sup> (Block Letters)	Programme Code	Fee (HK\$)	
	No.	Status <sup>(1)</sup>						
1								
2								
3								
							Total (HK\$)	

I am unemployed and not working. I am planning to rejoin the workforce.

Contact Person : \_\_\_\_\_ Telephone No. : \_\_\_\_\_ E-mail : \_\_\_\_\_  
*Contact information is used solely for communication of this particular event, without update to your member profile.*

**Payment Method** (Please tick the appropriate box)

Cheque (no. \_\_\_\_\_) payable to "Hong Kong Institute of Certified Public Accountants" or "HKICPA" <sup>(7)</sup>

BOC HKICPA VISA     BOC HKICPA UnionPay card     Other VISA / MasterCard

Card Number:																				Card Expiry Date (MM/YY):				
Cardholder's Name (block letters):														Cardholder's Signature:						Date:				

*Payment receipt will be sent to your email address provided above once the payment is confirmed.*

**Disclaimer:**

- The opinions expressed by external guest speakers are, by their nature, those of the speakers. They are not necessarily endorsed by the Institute nor do they necessarily reflect the official policies and views of the Institute, its staff or members.
- The Institute takes no responsibility for any loss associated with any person acting or refraining from acting as a result of participation in the event.
- The Institute does not endorse or recommend any products or services that may be mentioned in the event and is not responsible for any loss or damage arising from the use of such products or services. Participants are reminded that there may be a wide range of related products or services available in the market and that they should carry out their own research and obtain independent advice before subscribing to any products or services.

- Notes:**
- Membership Status: **NP** = Non-Practising, **P** = Practising, **IA** = International Affiliate, **S** = Student, **GAA** = GAA Passport holder, **NM** = Non-Member.
  - Confirmation of enrolment will be sent to you via email prior to the date of event, in which you will be given login details to the webinar that are for your exclusive use ONLY and you should not share them with anyone. For HKICPA member, 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 order not to delay the process, please ensure payment is made together with your application. If you do not receive any confirmation email from the Institute, please contact 2287 7508.
  - All applications are on a first-come-first-served basis.
  - Application by email will ONLY be accepted when payment is made by credit card. Cash is strictly not accepted. Please ensure all the particulars relating to payment are completed, otherwise the application cannot be processed. There is NO need to send in the enrolment form again if it has already been sent to the Institute by email. Please send the completed form to [enrolment@hkicpa.org.hk](mailto:enrolment@hkicpa.org.hk).
  - For credit card payment, the card should be valid with expiry date at least 1 month from the date of event.
  - Please issue SEPARATE CHEQUE for each event.
  - In normal circumstances, the event fee is non-refundable or non-transferrable upon receipt of payment by HKICPA. Should the event be cancelled or postponed due to unforeseeable circumstances, 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.
  - The Institute reserves the right to change the date, speaker or to cancel the event due to unforeseen circumstances.
  - No unauthorized audio or video recording is allowed for the online courses.

**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 on which you are enrolled. 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.hkicpa.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@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/>.

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

Name:	Name:
Address:	Address: