

財富傳承與策略管理 家族辦公室認證課程

掌握亞洲家族辦公室趨勢
開創財富新未來



認識香港家族辦公室生態

深入了解市場發展、監管
環境與政策優勢



資產架構與稅務策略

掌握資產配置、國際稅務
規劃與跨境要點



數碼資產與創新機遇

探索數碼資產、區塊鏈與
AI驅動的投資新世代



傳承治理與風險管理

建立有效治理架構，實現
跨世代傳承與可持續發展

專業師資團隊 · 實戰導向教學 · 高端人脈網絡

課程統籌及專業導師



Dr. Keith Chau

◆ 香港理工大學專業進修學院
高級顧問



Ms. Connie Yeung

◆ 慷澄研策有限公司
董事總經理



Mr. Allan Lee

◆ 傳承學院副院長
(專業培訓及治理)
◆ 家族治理中心總裁



Mr. Calvin Lam

◆ 鼎珮集團
董事



Dr. Ricky Lee

◆ 一瑄家族辦公室
創辦人



Mr. Raymond Chak

◆ 翟氏有限法律責任合夥律師行
合夥人



Mr. Heiman Ng

◆ 資深藝術顧問
大學講師

Module Title	Key Topics Covered
1 Family Office Landscape and Values	◆ Overview of Family offices in Hong Kong. The landscape and Government support in Hong Kong. Different type of family office SFO vs. MFO models, What is BFO? ◆ 7 values of Values of Wealth succession
2 Family Governance, Constitution and Policy	◆ Establishing a strong governance model, articulating family values and goals, writing a family constitution, and setting up a family council framework ◆ All rounded succession planning for HNW family
3 Investment Principles and Portfolio Strategy	◆ HNW family investment preference, asset structuring, investment options
4 Alternative Assets and Special Investments	◆ Strategies for Digital Assets (Crypto asset, RWA), Art investment and portfolio management, and investment strategies outside of typical portfolios. ◆ Art investment and portfolio
5 Importance of Asset structuring Succession and Wealth Transfer	◆ Concepts around succession and wealth transfer, wealth planning tools for the UHNW segment, and addressing challenges in multi-jurisdictional and multi-generational planning ◆ Examining key regulatory and compliance risks in different country, solutions to mitigate risks, covering cybersecurity, principal reputation, and operating risks ◆ Essential knowledge of International Tax, US, Canadian, UK, Australian, China, and Hong Kong Taxes. Utilizing Double Tax Agreements to minimize excessive cross-border taxes

DATE 14 / 11 | 21 / 11 | 28 / 11 (All Saturdays)

TIME 9:00-18:00

VENUE PolyU Main Campus | Hung Hom Bay Campus | West Kowloon Campus

MEDIUM OF INSTRUCTION

Cantonese (supplemented by English)

COURSE FEE \$9,800 ▶ **\$7,500** **Early Bird**

(Enroll on or before 21/10/2026 to enjoy the early bird discounts at HK \$7,500)

CERTIFICATION

Students who have completed the assessments, and attended at least 80% of the course will be presented with a Certificate awarded by PolyU SPEED.

ENQUIRY

如有查詢，歡迎聯絡助理學術事務主任 Ms Yuki Lai

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