

FOAHK 2025 Case Competition

Alternative Investment Portfolio Management

Looking to connect with the evolving family office ecosystem?

Participants will have access to an exclusive training webinar and the opportunity to work closely with industry veterans. Shortlisted teams will receive mentorship from experts in leading banks, family offices, and asset management firms. They will also have the chance to present their ideas to seasoned industry professionals.

Theme:

All in the Family: Building a Strategic Alternative Investments Portfolio

Alternative investments, including private equity, venture capital, and other non-traditional asset classes, have gained prominence as traditional financial avenues have no longer become the sole source of growth or stability. But how does one choose what strategies, geographies, and sectors to invest in? More specifically, how might a family office choose to allocate versus an institutional investor? Students will dive deep into the world of alternative investments and family offices, and gain first-hand practical knowledge as well as analytical skills essential for a career in this industry.

Register Now!

Registration Deadline:
13 Dec 11:59 PM (HKT/SGT)



Key Timeline

- Exclusive Webinar
14 Dec 12:00 pm (HKT/SGT)
- Round 1 Release
16 Dec 12:00 pm (HKT/SGT)
- Round 1 Deck Submission
23 Dec 12:00 pm (HKT/SGT)
- Round 2 Release
24 Jan 12:00 pm (HKT/SGT)
- Round 2 Deck Submission
8 Feb 12:00 pm (HKT/SGT)
- Final Presentation
19 Feb 1:00 pm - 4:30 pm (HKT/SGT)

About FOAHK

(Family Office Association Hong Kong)

The FOAHK is an independent family office trade association established in November 2020. As a nonprofit consultative industry body, the FOAHK represents family offices serving ultra-high-net-worth (UHNW) individuals and their families on governance, legislative, and regulatory matters.



Ms. Jessica Cutrera
Chair of FOAHK and
President of Leo Wealth



Mr. Grant Ko
Chair of Education &
Research Sub Committee of
FOAHK and Chairman of
Wisdom Group Holdings

<https://www.foahk.org/case-competition>

Awards

Champion

- Cash prize - \$5000
- CAIA Association Fundamentals of Alternative Investments course scholarship
- IPI x Henley Business School Family Office Programme - exclusive access to 2 modules

1st runner up

- Cash prize - \$3000
- IPI x Henley Business School Family Office Programme - exclusive access to 1 module

2nd runner up

- Cash prize - \$2000
- IPI x Henley Business School Family Office Programme - exclusive access to 1 module

Finalists

- On-site visits to top banks and asset management firms
- Publication on FOAHK's social media platforms, newsletter, and website
- Interview opportunities with 10+ asset management firms

Who We Are Looking For

- Full-time undergraduate students or recent graduates from all majors across the globe are welcome.
- Students from different universities within the same region may form a team. However, cross-region teams are not permitted.
- Each team must consist of 3-4 students and submit one online registration form before 13 December 2024.
- Each team must nominate a team captain who will be responsible for submitting the registration and receiving all competition material.



STAGES OF THE COMPETITION

01

Round 1 will focus on portfolio construction and wealth management. The question will be released on **December 16, 2024 at 12:00 PM HKT**.

02

Round 2 will be based on the round 1 framework. Students will be required to dive deeper into fund analysis and family office services that can add value to the client's portfolio. The shortlisted teams will receive the round 2 case on **January 24, 2025, at 12:00 PM HKT**. The FOAHK will then assign an industry mentor to each team.

Deck Submission & Presentation Requirements

- All decks and oral presentations should be conducted in **English** only.
- Round 1 - Participants should submit their PowerPoint deck in PDF format of **not more than 15 slides** (excluding cover page, agenda, and executive summary). A font size of at least 15 and 1.0 line spacing should be adopted.
- Round 2 - The final presentation will consist of a 15-minute presentation followed by a 10-minute Q&A on **[February 19 2024]**. Finalists will present their cases to experienced industry practitioners and government representatives. Teams in Hong Kong will conduct their presentation in-person, whilst those outside of Hong Kong will present virtually.

Learning Outcomes - What to Expect



Understand how a wealth manager generates long-term value and achieves clients' investment goals amidst the current macroeconomic environment.



Acquire practical business knowledge and insights from industry veterans through exclusive training and one-on-one mentorship.



Interact with renowned corporates and investment experts to broaden your industry network and deepen your understanding of the field.

EXCLUSIVE

WEBINAR

Time: 14 Dec, 2024 12 PM (HKT/SGT)

- **Introduction to Alternative Investments**
presented by CAIA Representative (TBC)
- **Insights on Portfolio Management & Market Outlook**
presented by Chao Li, Investment Vice President of VMS Group

Industry Mentors



Alan To
CEO
Climate Finance Asia



Chao Li
Investment Vice
President
VMS Group



Marshall Jen
Founder
FiBi Advisory and
Research Institute



Jennifer Hsieh
Senior Student Advising
Officer, Master of Family
Wealth Management
University of Hong Kong

and more to announce...

Judges



Bonnie Leung
Chair
Family Wealth
Management Program,
University of Hong Kong



Elton Cheung
Managing Partner
VMS Group



Kelvin Wong
Chief Operating Officer
Bernina Group



Neil Tan
Managing Director /
Chairman
Tsunami Advisors/
AIHK



Peter Kuo
Co-Founder and Partner
/ CEO
Canyon Bridge / PTK
Technologies



Water Cheung
Senior Partner, CEO Asia
Pacific
StormHarbour
Securities

and more to announce...

Interview opportunities with:



and more...