

## Direct Dialogue with Investment Consulting and Family Office Expertise

A new course, FINA 3336 – Investment Consulting, Institutional Business and Family Office, was added to the AMPB curriculum in the second semester of 2021-22. The course was led by two experienced industry practitioners, Ms Janet Li and Mr Edmond Lau and aims to provide conceptual and practical approach to the understanding of the institutional investment consulting and family office business. It offers students learning opportunities with practitioners who can share real business challenges and bring latest industry developments as well as innovations. To enrich perspective, 4 guest speakers were invited for interactive lecture sessions with the students.

### Nurture deep understanding in the investment consulting industry dynamics



*Mr. Alvin Tay, Head of Investment Risk, The Hong Kong Jockey Club*

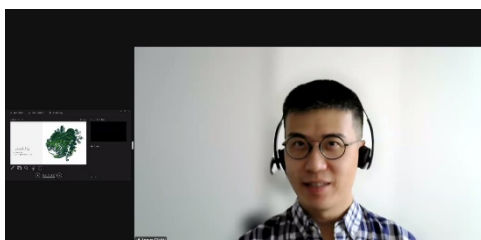
Mr. Alvin Tay, Head of Investment Risk of The Hong Kong Jockey Club, was invited to share with students the typical investment roles and investment channels of an asset owner. He also shared the skills requirements should students be interested to join an asset owner.

with the aim to giving back to the community. He also shared the typical organisation arrangements at asset management firms and deep dived into institutional business sales process and characteristics.



*Mr. David Chang, ex CEO & Regional Head, Greater China, Franklin Templeton*

### Recent trend in Asian family offices

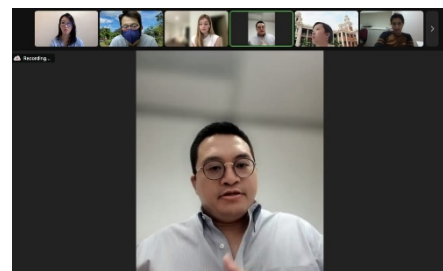


*Mr. Angus Chan, COO and CFO of Sunlink Holdings (H.K.) Limited*

Mr. Angus Chan, COO and CFO of Sunlink, shared about how the family office he works for is being structured and operated, with an aim at meeting their objectives of community building. Rather than purely focusing on financial returns to business operations, the family office hopes to grow in the education sector alongside with investments in real estate and technology.

achieved in offering blockchain and data services to family offices and hedge funds. Mr. Lau also shared his insight on how virtual asset servicing can be integrated into traditional financial services.

Mr. Eddie Lau, CEO of ARTA TechFin, shared with us the latest milestone ARTA has



*Mr. Eddie Lau, CEO of ARTA TechFin Corporation Limited (HKEx: 279 HK)*

"Through the course, I got closer to the industry by getting insights into fund strategies, asset allocation, ESG and digital assets. Students were provided with step-by-step guidance in building technical skills and writing investment reports in a structured and professional manner." Christina Li, AMPB 2022 student enrolled in FINA3336.