

# INNOVATION IN RETIREMENT SOLUTIONS

Financial Technology, more known to as FinTech, looks set to reshape the pension sector in the future. How can Hong Kong pension schemes deal with both challenges and opportunities? Can we learn from other countries? This seminar will explore how Robot Advisory can benefit pension scheme members and how to deal with the obstacles of implementing Fintech in pension sector..... thereby overcoming the problems plan sponsors may face and get well prepared for the future!

HKRSA has invited prominent speakers and panelists from pension plan sponsors in Hong Kong and the sectors representing key stakeholders (including Mr. Patrick Tissot-Favre of Amundi, Mr. Marcos Chow and Mr. Neil Macdonald of KPMG and Ms. Hayly Leung of Jardine Matheson) to our upcoming seminar to share their views on these important topics. This will be followed by a panel discussion facilitated by Ms. Adeline Tan of Mercer.

Date: 28 Oct 2019 (Monday)

Time: 4:30pm - 6:30pm (Registration starts at 4pm)

Venue: 14/F, Deacons, Alexandra House, 18 Chater Road, Central, Hong Kong

Fee: Member: HK\$350 | Non-member: HK\$500  
(Members of CFA Institute, HKTA & ASHK can enjoy HKRSA member rate)

Language: English

This seminar is eligible for 2 hours of non-core CPD/CPT training hours.  
Enquiry or RSVP to [events@hkrsa.org.hk](mailto:events@hkrsa.org.hk) or call (852) 2147 0090.

**Register now** to join us to learn more about all the changes and more!

## Our Speakers & Panelists

### Session Chair:



Mr. Marcos Chow  
Hong Kong Head of Technology  
Enablement  
KPMG China



Mr. Neil Macdonald  
Head of Wealth & Asset  
Management Centre of Excellence  
KPMG China



Mr. Patrick Tissot-Favre  
Head of International Business  
Development, Employee Savings &  
Retirement (ESR) Business Line  
Amundi



Ms. Hayly Leung  
Executive Committee, HKRSA  
General Manager, Group HR  
Services  
Jardine Matheson



Ms. Adeline Tan  
Wealth Business Leader, Hong Kong  
Mercer

### Premier Sponsors:



# EVENT PROGRAMME

**16:00 - 16:30 Registration**

**16:30 - 16:35 Welcome**

**Ms. Janet Li**

Chairman | HKRSA

Wealth Business Leader, Asia | Mercer

**16:35 - 17:25 Keynote Address**

**Mr. Patrick Tissot-Favre**

Head of International Business Development

Employee Savings & Retirement (ESR) Business Line | Amundi

**Mr Neil Macdonald**

Head of Wealth & Asset Management Centre of Excellence | KPMG China

**17:25 - 18:10 Panel Discussion**

Session Chair:

**Ms. Adeline Tan**

Wealth Business Leader, Hong Kong | Mercer

Panel Members:

**Mr. Marcos Chow**

**Mr. Patrick Tissot-Favre**

**Ms. Hayly Leung**

Executive Committee | HKRSA

General Manager, Group HR Services | Jardine Matheson

**18:10 - 18:25 Q & A**

**18:25 - 18:30 Closing**

**Ms. Doris Ho**

Vice Chairman | HKRSA

Executive Director | Hospital Authority Provident Fund Scheme



# SPEAKERS & PANELISTS



## **Mr. Marcos Chow**

Hong Kong Head of Technology Enablement  
KPMG China

Marcos is a Partner with KPMG China, and is the Head of Technology Enablement practice and also Head of Emerging Technology industry in Hong Kong. He and his team helps clients accelerate their digital transformation journey, with a focus on Greater Bay Area and Smarter Cities. He has over 19 years of experience as an executive in technology leadership roles across Australia, ASEAN, Greater China and the USA. He was also part of a Cloud/Software as a Service startup in 2005, where the start up raised USD 26M. Marcos represents KPMG in a number of associations such as Asia Securities Industry & Financial Markets Association, Australian Chamber of Commerce (Hong Kong), Fintech Association of Hong Kong, and Malaysian Chamber of Commerce (Hong Kong & Macau)



## **Mr. Neil Macdonald**

Head of Wealth & Asset Management Centre of Excellence  
KPMG China

Neil Macdonald moved to Hong Kong in July 2019 to lead the Wealth and Asset Management Centre of Excellence. He was previously a Managing Director in the UK firm's asset management practice, which he joined in 2017. Neil has over 15 years of asset management industry experience working in various senior front office roles for a number of global investment firms, including BlackRock and JP Morgan Asset Management. Before entering the asset management industry, Neil held senior positions in the banking sector where he led significant change programmes spanning public policy, HR and Technology. Neil has also worked in Corporate Strategy, with specific responsibility for managing the Group-level ExCo and OpCo. Neil's broad skillset includes: Leadership, Governance, Business Strategy, Change Management, Distribution/Sales Leadership, and Product & Service Development.



## **Mr. Patrick Tissot-Favre**

Head of International Business Development,  
Employee Savings & Retirement (ESR) Business Line  
Amundi

Patrick has 30 years of experience in financial industry especially in private banking, investment banking and asset management and he is Head of International Business Development at Amundi ESR business line. Patrick started in the Private Banking Department of Banque Indosuez in charge of product development. He then joined the Project & Export Finance Department and was involved in particular in the financial structuring of power plants, telecom projects and water treatment financings in Asia and in Italy where he spent 2 years. In 2002 he joined Amundi and held various clients' coverage positions at Amundi, Amundi - Alternative Investment (fund of hedge funds) and Amundi Private Equity (Private Equity and Infrastructure Funds of Funds) In 2013, he moved to Hong Kong as Head of Marketing and Communication – North Asia. In 2016, he became Head of International Business Development World ex-Europe at CPR Asset Management. Patrick holds a Master's Degree in Economics and a post-graduate diploma in Wealth management.



## **Ms. Hayly Leung**

**Executive Committee Member, HKRSA**  
General Manager, Group HR Services  
Jardine Matheson Limited

Hayly Leung is the General Manager of HR Services in Group Human Resources of Jardine Matheson as well as the HR Director Jardine Pacific. Hayly provides guidance and support across the Jardine group companies. She plays a key role in developing HR policies and in formulating HR strategies for mergers and divestments. She also drives the transformation of the people agenda in Jardine Pacific. Prior to joining Jardine Matheson, Hayly was the Group HR Director of Jardine Schindler Group. Before that, Hayly held various VP roles in HR in BT Group, one of the world's leading telecommunications companies, with management responsibilities across Asia Pacific and Europe.



## SPEAKERS & PANELISTS



**Ms. Adeline Tan**

Wealth Business Leader, Hong Kong  
Mercer Investments (HK) Limited

Adeline's move to Hong Kong follows 12 years of consulting experience with Watson Wyatt (now Willis Towers Watson) in the UK. Her most recent role was primarily focused on delivering whole-fund investment solutions to clients that have chosen to delegate a greater part of their investment processes. In 2008, she returned to the UK after a secondment to the Shanghai office in 2007. She focuses on investment and actuarial consulting, specializing in the areas of long-term investment strategy, DB/DCpension design, asset-liability studies, dynamic de-risking, performance monitoring, and portfolio construction. She serves a broad client base including corporations, wealth managers and public funds. Adeline is a graduate of the Business School at the University of Warwick and is a Fellow of the UK Institute of Actuaries.