MPF – fund choices and implication to better retirement outcome

How is the money in your MPF retirement accounts invested? Some people have been asking for more investment choices in MPF, and some have been struggling in making fund choice decision. While more diverse investment choices may enhance flexibility and employee satisfaction, the Mandatory Provident Fund Authority has relaxed the restriction on MPF funds - up to 100% of the funds of an MPF Product may be invested in REITs, subject to approval. Some claim that REITs can generate retirement income, diversify portfolio and provide inflation protection. In this webinar, speakers will examine survey findings on public mentality on MPF fund choices, and share implication of REITs being an allowable asset in MPF. The panelists with MPF providers, facilitated by Mercer, will discuss on how to assist members to select funds.

Event Details

Please join the webinar with Freddie Cheng and Adeline Tan of Mercer HK as speakers

Date & Time: 3 September, 2021 (Friday) 3:00-4:00pm

Login: Details will be emailed to participants on 2 September, 2021 (Thursday)

Language & Fee: English I Free

Register now by scanning QR code

Note:

1. This webinar is eligible for 1.0 hour of non-core CPD/CPT training hours, subject to approval by relevant accreditation bodies. Attendees must log in the Zoom link with the same name and email address registered with the HKRSA.
2. Virtual platform will be provided Mercer HK. By registering for this event, you are providing your consent to the HKRSA to pass your personal particulars (including name, title, organisation, and email address) to create access to the Zoom facility for you.
3. Enquiry to events@hkrsa.org.hk or call (852) 2147-0090

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Event Programme

3:00 – 3:05	**Opening Remarks** Ms. Janet LI, CFA, MAoF Immediate Past Chairman of the Executive Committee & Chairman of the Business Strategy Sub-committee , HKRSA Partner and the Wealth Business Leader, Asia - Mercer HK
3:05 – 3:15	**Speaker Part I - How do HK employees think about MPF?** Mr. Freddie CHENG Senior Consultant of the Wealth Business, Mercer HK
3:15 – 3:25	**Speaker Part II - REITs in retirement funds and MPF** Ms. Adeline TAN Wealth Business Leader, Mercer HK
3:25 – 3:55	**Panel Discussion – How to assist members to select funds** **Facilitator** Ms. Mandy CHAN Senior Consultant of the Wealth Business, Mercer HK **Panelists** Mr. John LUI Chief Investment Strategist Sun Life Asset Management (HK) Limited Mr. Andy YEUNG Head of Pension Sales and Servicing, Pensions HSBC
3:55 – 4:00	**Closing Remarks** Ms. Doreen SIU Member of the Executive Committee, HKRSA Human Resources General Manager, MTR Corporation

Opening Remarks

Ms. Janet LI, CFA, MAoF
Immediate Past Chairman of the Executive Committee &
Chairman of the Business Strategy Sub-committee , HKRSA
Partner and Wealth Business Leader, Asia - Mercer HK

Janet Li is a Partner and the Wealth Business Leader, Asia at Mercer. She oversees and is responsible for Mercer's Wealth (Investment and Retirement) Business in Asia. In her role, she leads and drives strategic growth to the business as well as its operations and implementations.

Janet has vast experience working with institutional clients (sovereigns, pension, insurance, corporate and wealth management). Her experience also spans across a wide range of retirement and investment services (asset liability review and strategy, portfolio construction, manager review, selection and monitoring, investment governance and transformation, discretionary management, member communication and education and related tools' developments) and a diverse range of asset classes (public equities and fixed income, private equities, illiquid credit, real estate and infrastructure).

Janet is also a Committee Member of the Insurance Asset Management Association of China (IAMAC) Pension Fund Management Professional Committee and a Management Committee Member of the Taiwan Pension Fund Association. In addition to these, she is currently serving as Member on the Human Capital Committee of the Financial Services Development Council (FSDC), Advisory Group Member (Working Adults) of the Investor and Financial Education Council (IFEC), Member of the FTSE Russell Asia Pacific Equity Advisory Committee and Member of the Hong Kong Academy of Finance (AoF). Janet is named as the Pensions Woman of the Year by the Asia Asset Management 2020 Best of the Best Awards.

Janet graduated with Bachelor Degree of Economics and Finance from The University of Hong Kong and is a Chartered Financial Analyst.

Speaker – Part I

Mr. Freddie CHENG

Senior Consultant of the Wealth Business, Mercer HK

Freddie is a Senior Consultant in Mercer's Wealth business in Hong Kong. Freddie's core areas of expertise are benefits design, MPF providers review, change management consulting and employee communication.

Prior to joining Mercer, Freddie worked at an employee benefit broking firm for over eight years, focusing on the development of its pension business. He was involved in different aspects, from establishing the pension model to conducting HR seminars, developing member communications and providing in-house training on the pension environment, including MPF Market changes.

Freddie graduated with a bachelor's degree in social science from La Trobe University in Melbourne, Australia. He has been named a Fellow of the Life Management Institute in the insurance industry.

Speaker – Part II

Ms. Adeline TAN

Wealth Business Leader, Mercer HK

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/DC pension 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.

Facilitator

Ms. Mandy CHAN

Senior Consultant of the Wealth Business, Mercer HK

Mandy is a Senior Consultant in Mercer's Wealth business in Hong Kong. She drives and develops retirement plan solutions to private and public sectors in Hong Kong and other countries in Asia Pacific.

Mandy has over ten years of retirement and benefit consulting experience. She has extensive experience providing actuarial advice to local and multinational clients including the actuarial funding and accounting valuations of retirement schemes, from civil servant pension to conglomerate group retirement funds.

She has extensive experience advising clients on international pension plan, asset liability modelling, defined benefit and defined contribution plan benefit design and restructuring, benefit changes and implementation, member communication, financial wellness, M&A benefit harmonization strategy, provider reviews and governance review on administrator and trustee.

Mandy is a Fellow of the Society of Actuaries and has attained the Chartered Enterprise Risk Analyst credential from the Society of Actuaries. She received a BBA in insurance, financial and actuarial science from the Chinese University of Hong Kong.

Panelists

Mr. John LUI
Chief Investment Strategist
Sun Life Asset Management (HK) Limited

With over 27 years extensive experience in macroeconomic analysis, portfolio management, as well as investment research in both traditional funds and hedge funds, John is a seasoned investment strategist in Hong Kong's finance industry. He is also a renowned market commentator, speaker and trainer. John joined Sun Life Asset Management in 2013 in the capacity of Chief Investment Officer and then Chief Investment Strategist from 2018.

John obtained a BSc in Statistics and BA in Economics from the University of Manitoba, Canada; and an MBA in Investment Finance from Bernard Baruch College, New York, USA.

Mr. Andy YEUNG
Head of Pension Sales and Servicing, Pensions
HSBC

Andy is the Head of Pensions Sales and Servicing for the pension business of HSBC in Hong Kong. He oversees the group's Pension sales and distribution functions as well as customer servicing functions both for employers and individuals. Andy has over 20 years of experiences in the industry and have worked in a number major financial institutions in Hong Kong. In addition to sales and distribution, Andy also got extensive experiences in strategy formulation, insurance product development and project management at a regional level.

Andy graduated from The University of Hong Kong with a Bachelor's degree in engineering. He is a CERTIFIED FINANCIAL PLANNER® professional and a Fellow of the Life Management Institute.

Closing Remarks

Ms. Doreen SIU
Member of the Executive Committee, HKRSA
Human Resources General Manager, MTR Corporation

Doreen Siu is the General Manager – Human Resources of MTR Corporation, one of the major employers with about 17,000 employees in Hong Kong. She is a seasoned HR professional with all rounded experience encompassing general human resources management, talent acquisition, reward management, executive compensation, employee engagement, merger and integration, HR transformation, etc. To contribute to the community, Doreen is also serving as member of different advisory committees for a number of non-profit making organisations in Hong Kong.