



香港退休計劃協會

The Hong Kong Retirement Schemes Association

Premier Sponsors Package 2025

The Hong Kong Retirement Schemes Association (HKRSA) was established in 1996 to lead and promote sustainable and better retirement outcomes through the following via the HKRSA and RetireHK platforms:

Empower

We empower employers, individuals preparing to retire and retirees with retirement planning and tools.

Advocate

We advocate key retirement issues, retirement income and look for value creation.

Share

We share and facilitate retirement information and knowledge.



Address: 1204, 12/F, OfficePlus @Sheung Wan,
93-103 Wing Lok Street,
Sheung Wan, HK

Tel: 2147-0090 Email: info@hkrsa.org.hk Website: www.hkrsa.org.hk

[Facebook](#) | [LinkedIn](#)



香港退休計劃協會

The Hong Kong Retirement Schemes Association

LETTER TO RETIREMENT INDUSTRY BUSINESS LEADERS: HKRSA'S PREMIER SPONSOR PACKAGE FOR 2025

Why should leading industry players like you become a “HKRSA Premier Sponsor?” By doing so, you will be publicly recognized for your affiliation with Hong Kong's only not-for-profit organization dedicated to retirement issues, and at the same time be privy to privileges that will enrich your potential to engage in emerging retirement industry developments.

Formed in 1996, HKRSA has grown in size and leverage and is positioned to provide a strong voice on retirement protection matters in service to our members, employers and other industry stakeholders. We aspire to continue expanding our network and staying at the forefront of thought leadership, through the sponsorship of events, research, policy recommendations, strategic partnerships and alliances, public education and other activities. The launch of our dedicated retirement portal, RetireHK demonstrates our commitment to serve our members and the people of Hong Kong and successfully became a charitable institution under Section 88 of the Inland Revenue Ordinance on 23 May 2023.

We invite you to join our continuing journey to promote best practices in retirement protection for the people who live and work in our vibrant global city. As “HKRSA Premier Sponsor”, you will be entitled to exclusive affiliation and benefits as described in this package.

Do not miss out on the opportunity to enjoy special privileges reserved for HKRSA Premier Sponsors in a number of important industry events taking place in 2025.

Cost: HKD 80,000 for one year

We need your support to build a stronger industry platform, and we look forward to working together with you in lending a stronger voice to better retirement options for the people of Hong Kong.

Thanking you in advance for your sponsorship,

Sincerely,

Janet LI
Chairman

WHY HKRSA?

Reasons to be a Sponsor

Brand building and promotion through
Sponsoring Events

High-profile publicity with
your company logo displayed on our website, at major HKRSA sponsored events, promotional materials and in our news bulletins

Priority Booking for all major events – with added option of **unlimited seats at member rates or occasionally complimentary tickets**

Exclusive speaking opportunities at HKRSA events: Seminars, Roundtable discussion, Prestige events.

Exclusive Luncheon/Regulatory Update Meeting
with government representatives

Preferential seating at HKRSA sponsored events – with the opportunity to meet and connect with renowned speakers/government representatives

Unique opportunity to contribute articles to the **Premier Sponsor Column** to share your thought leadership content with our members and friends based on “first come first serve” to choose the slot of contribution

Enjoy special rates and discounts at different events of other organizations when HKRSA as the supporting organization

Visibility and opportunity to network with HR professionals on pension related subjects

Premier Sponsors 2024



About RetireHK

RetireHK is a newly launched retirement portal by The Hong Kong Retirement Schemes Association (HKRSA) to empower the elderly and adults in Hong Kong to live with independence, dignity, and a profound sense of purpose in their retirement years. RetireHK is an independent and separate extension of HKRSA, dedicated to providing support, resources, and opportunities that enable Hong Kong people to maintain their physical and mental well-being, build strong social connections, pursue their passions, and actively contribute to society.

Three main areas of focus for better quality of retirement life



Wealth



Health



LiveWell

RetireHK also aims to gather and convey comprehensive information and activities through various outreach strategies to help the elderly and adults plan for a better retirement experience with confidence.

Unique Positioning

- Became a charitable institution or trust of a public character and was granted exemption from tax under Section 88 of the Inland Revenue Ordinance on 23 May 2023
- Leverage the access to many corporation's employees to participate in our activities
- Help individuals to develop social circles and lead a more active life by joining our activities or through our selected information
- Offer suitable and attractive partners' service or product offerings to targeted individual member

HR Roundtable Workgroup Meeting

HR Roundtable Workshop has been formed since March 2023, serving as a platform for HR practitioners to network, share and exchange views and opinions on retirement planning and related issues, latest market developments as well as best practices under a members-led approach.



Examples of topics discussed

- Redefining retirement
- Three Instruments of Peace (平安三寶)
- Medical conversion plan
- Retirement planning
- Preparing employees for retirement
- Wellness & well-being

Potential Upcoming topics

- Salary and pay trend survey
- Abolition of MPF offsetting
- Talent attraction and retention
- Retirement options in GBA
- Employee Assistance Programme
- Diversity and Inclusion

CROSS STRAITS PENSION FORUM

To exchange and share the development of and enhancement in the social security and retirement protection system across the four regions of the Mainland China, Hong Kong, Macau and Taiwan, with the four regions taking turn to host the annual event which is generally held in October.



Research reports including:

2021: Research on Retirement Protection and Related Services in Hong Kong

2024: Retirement preparation and long-term care issues in the Guangdong, Hong Kong-Macau Great Bay Area for Hong Kong people

Happy Moments of HKRSA 2024

Annual General Meeting (AGM) & 28th Annual Dinner

13
Jun



GBA Delegation

由於本會於2021年對港人到大湾区退休進行研究報告，題目為：大湾区 - 香港退休人士的目的地？故於今年以深圳的大湾区為主，進行兩場考察團參觀；目的是為促進退休人士和計劃退休人士對大湾区內的社會保障、醫療制度、退休生活的了解。



1 Mar

專訪及探討大湾区的金融體制、退休制度與設施等，包括1) 前海金融大湾区招商中心、2) 與當地銀行午餐會、3) 香港賽馬會深圳復康會頤康院 4) 泰康之家-鵬園。

8 Nov

專訪及探討大湾区的醫療及健康相關管理設施及制度發展，包括 1) 香港大學深圳醫院, 2) 深圳前海泰康國際醫院。

Christmas Luncheon

3
DEC



WEBINARS

HKRSA 2024



**20
Mar**

An ORSO Schemes – Keep it or Leave it?

Language: English

Co-hosted Sponsor: BCT Group

解讀中國經濟未來：政策影響、市場信號與投資機會

Language: Mandarin

Co-hosted Sponsor: Taikang Asset Management

9

Apr



**6
Jun**

大灣區退休

Language: Cantonese

Co-hosted Sponsor: AIA

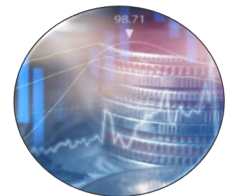
投資運籌帷幄 駕馭局勢動向

Language: Cantonese

Co-hosted Sponsor: Fidelity International

18

Jul



**15
Aug**

中國私人養老金市場為資產和財富管理公司帶來什麼機遇？

Language: Mandarin

Co-hosted Sponsor: Manulife

Sustainable investing: investing in a cleaner planet

Language: English

Co-hosted Sponsor: Allianz Global Investors

11

Sep



**19
Sep**

Fueling the Future – Investing Across the Global Energy Landscape

Language: English

Co-hosted Sponsor: PGIM Fixed Income

How to Integrate Artificial Intelligence into Retirement Benefit Management

Language: English

Co-hosted Sponsor: Amundi

22

Oct



21 Nov

Co-hosted Sponsor: Mercer

11 Dec

Co-hosted Sponsor: Franklin Templeton

Jan 2025

Co-hosted Sponsor: T. Rowe Price

退「優」法則 2024

<https://www.youtube.com/watch?v=uALdXNEhtTE>

制定退休計劃莫遲疑

Episode 1

18 Apr 2024

Patrick CHAN

VP of Product, Sales & Marketing
Taikang Asset Management
(Hong Kong) Company Limited



陳浩明

產品及銷售部副總裁
泰康資產管理(香港)有限公司

<https://youtu.be/juKbb6zhdYg>

如何合理規劃退休計劃?

Episode 2

25 Apr 2024

Ferdinand CHEUK, CFA

Senior VP & Portfolio Manager
Templeton Global Equity Group
Franklin Templeton Investments
(Asia) Limited Hong Kong



卓兆源, CFA

高級副總裁及基金經理
鄧普頓環球股票團隊
富蘭克林鄧普頓投資(亞洲)
有限公司 香港

<https://www.youtube.com/watch?v=oN1QcDh2GPw>

利率環境衝擊退休金?

Episode 3

2 May 2024

Anthony YUNG

Head of Hong Kong Institutional &
Pension Business
Invesco



容啟實

香港機構業務及退休業務部總監
景順投資管理有限公司

https://youtu.be/gBCHzyLd6_k

如何建構合適的退休金組合?

Episode 4

9 May 2024

Jack CHEN

Investment Director
China Asset Management
(Hong Kong) Limited



陳俊偉

投資總監
華夏基金(香港)有限公司

<https://youtu.be/2tuP3G9c-dY>

退休保障新趨勢

Episode 5

16 May 2024

Roger LAU

Head of Retirement Business
Hong Kong Schrodgers



劉以浩

香港退休業務主管
施羅德投資

<https://youtu.be/zATZoZ2x3EU>

FinTech 新世代-未來的退休理財規劃

Episode 6

23 May 2024

Elaine WONG, CFA, CAIA

VP of Hong Kong & Macau
Institutional Business
Wellington Management HK Ltd



黃美玲, CFA, CAIA

香港及澳門機構業務副總裁
威靈頓管理香港有限公司

<https://youtu.be/q5cooGxvgjo>

MPF 必修課-如何比較與規劃?

Episode 7

30 May 2024

Albert LEUNG

Director of Hong Kong Institutional
Allianz Global Investors
Asia Pacific Limited



梁德銓

香港機構業務董事
安聯環球投資亞太有限公司

2025 YEAR PLAN



SEMINARS/WEBINARS/ DELEGATION/ MEMBER EXCHANGE FORUM

Topics cover the topical pension and retirement issues

Plan for 8-10 events including In-person Seminars



HR ROUNDTABLE WORKGROUP

Networking and interactive sharing sessions among HR professionals to uncover pension topics of priority and better serve employees' retirement needs

Bimonthly meetings



New

ORSO SCHEMES ROUNDTABLE WORKSHOP

Interactive sharing sessions with ORSO employers and HKRSA



MEDIA EVENT

Educational outreach to public via event collaboration with Media to address retirement related matters e.g. Metro Finance



AGM & ANNUAL DINNER

Our Signature Event of the Year!

Tentative: June



CROSS STRAITS PENSION FORUM

To exchange and share the development of and enhancement in the social security and retirement protection system across the four regions of the Mainland China, Hong Kong, Macau and Taiwan, with the four regions taking turn to host the annual event which is generally held in October.



CHRISTMAS LUNCHEON

An opportunity to get together and celebrate the festive season!

Tentative: Dec

<https://www.hkrsa.org.hk/en-gb/latest-events>