

The Actuarial Society of Hong Kong
Hong Kong Pension Symposium 2018

“Live to 120?”



28 November 2018 (Wednesday)

Hotel ICON, Silverbox Ballroom, Level 1

17 Science Museum Road, Tsimshatsui East, Kowloon, Hong Kong



PROGRAMME

“Live to 120?”

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MC: Anson Lo, Manulife

08:30 – 09:00	Registration
09:00 – 09:05	Opening Remarks Gary Lee , <i>Chairperson of the ASHK Pension & Employee Benefits Committee</i>
09:05 – 09:20	Keynote Speech Cynthia Hui <i>Executive Director (Members), Mandatory Provident Fund Schemes Authority</i>
09:20 – 10:15	“Can We Live to 120?” Facilitator: Stuart Leckie, OBE, JP , <i>Chairman, Stirling Finance Ltd</i> Panelists: Dr. David Dai, JP, MBBS (HK), FHKAM, FRCP, LLB (Hons.) , <i>Clinical Director for Healthcare for the Senior, Qualigenics</i> (TBC) , <i>Swiss Reinsurance</i>
10:15 – 10:40	Coffee Break
10:40 – 11:35	“How to Invest to 120?” Facilitator: Terry Yung , <i>Chief Investment Officer, Hang Seng Insurance</i> Panelists: Alan Liu , <i>Head of Treasury, Hong Kong Housing Society</i> Janet Li , <i>Chairman, Hong Kong Retirement Schemes Association</i>
11:35 – 12:30	“Is Annuity a Solution for Living to 120?” Facilitator: Billy Wong , <i>Business Leader, Health & MPF, Mercer Marsh Benefits</i> Panelists: (TBC) , <i>HKMC Annuity</i> Terry Li , <i>Head of Bancassurance, DBS Bank Hong Kong</i>
12:30 – 12:35	Closing Remarks Gary Lee , <i>Chairperson of the ASHK Pension & Employee Benefits Committee</i>
12:35 – 14:00	Lunch

END OF PROGRAMME

SPEAKER PROFILES



Cynthia Hui
Executive Director (Members)
Mandatory Provident Fund
Schemes Authority

Ms. Cynthia Hui is Executive Director (Members) of the Mandatory Provident Fund Schemes Authority. Ms. Hui is a qualified actuary and a fellow of the Institute of Actuaries of Australia with 30 years of experience in the financial industry, including pension, insurance and banking, in both public and private organisations. She has held Appointed Actuary, Chief Actuary and Regional Actuary positions in multi-national insurance firms, and positions with responsibilities for information technology in major financial institutions in Australia before joining the Mandatory Provident Fund Schemes Authority in 2005.



Stuart Leckie
OBE, JP, FIA, FSA
Chairman
Stirling Finance Ltd

Mr. Stuart Leckie is based in Hong Kong and advises on investments and pensions in Asia. He is the author of books titled "Investment Funds in China" and "Pension Funds in China". He is the Founding Chairman of the Hong Kong Retirement Schemes Association and was Chairman of the CFA Institute Advisory Council on Standards and Financial Market Integrity.

He has served as the Chairman of Watson Wyatt (now Willis Towers Watson) in Asia-Pacific and as Chairman of Fidelity Investments, Asia Pacific. He was a Director of Exchange Fund Investment Limited which created the Hong Kong Government's Tracker Fund, the first E.T.F. in Asia. He has advised the Chinese Government on pension reforms.

Stuart is a Fellow of the Institute of Actuaries (U.K.) and of the Society of Actuaries (U.S.A.). He is also Adjunct Professor at City University of Hong Kong. He is appointed Justice of the Peace by the Hong Kong Government, and has been awarded an O.B.E. by the British Government.



Dr. David Dai, JP
MBBS (HK), FHKAM,
FRCP, LLB (Hons.)
Clinical Director for
Healthcare for the Senior
Qualigenics

During his 30-year career in the medical profession, Dr. David Dai has specialised in geriatric, rehabilitation and pulmonary medicine. Dr. Dai was a member of several Hong Kong Government Labour and Welfare Bureau steering committees and working groups studying issues relating to community care and residential care services for the elderly. He also chairs the Independent Committee for Handling Complaints of the Social Welfare Department from 2015. In 2012, Dr Dai was appointed Justice of the Peace. Before retirement from the Hospital Authority, Dr. Dai was consultant geriatrician at Prince of Wales Hospital and led the complaint management unit.

After retirement in December, 2015, Dr. Dai has joined Qualigenics as the Clinical Director for Healthcare for the Senior; and is Director of Geriatric Medicine at Baptist Hospital since June 2016.

SPEAKER PROFILES



Alan Liu
Head of Treasury
Hong Kong Housing Society

Mr. Alan Liu joined the Hong Kong Housing Society in November 2016. Before joining the Housing Society, he was Head of Retail Distribution North Asia for Deutsche Asset Management. Prior to Deutsche, he was Alternative Specialist for UBS Wealth Management in Hong Kong. Alan has over 33 years of experience in the financial industry. His roles include actuarial consultant, asset consultant as well as institutional fund management.

Alan graduated from Macquarie University in Sydney NSW Australia with a Bachelor Degree in Economics majoring in Actuarial Science. He also holds a Master Degree in Business Administration from the University of New South Wales, Australia.



Janet Li
CFA
Chairman
Hong Kong Retirement
Schemes Association

Ms. Janet Li, CFA, is the Asia Wealth Business Leader at Mercer. She oversees and is responsible for Mercer's Wealth (Investment and Retirement) Business in Asia. In her role, she leads and drives business strategy as well as managing the team across Asia.

Janet has vast experience working with institutional clients (sovereigns, pension, insurance, corporate and wealth management). Her experience also spans across a wide range of 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).

Before joining Mercer, Janet was the Director of Investments, Greater China at Willis Towers Watson where she was also a core member of the Asia leadership team.

Janet is the Chairman of the Executive Committee, a Member of the Members Communication Sub-committee and a Member of the Business Strategy Sub-committee of the Hong Kong Retirement Schemes Association ("HKRSA"). She has been a delegate and a supporter to the annual Cross Straits Pension Forum (this year is the 10th anniversary), which the HKRSA has been one of the key organizers, for the past 8 years. Janet is also a Management Committee Member and a member of the Research and Development Sub-committee of the Taiwan Pension Fund Association and an Advisory Committee Member of the FTSE Taiwan Index Committee.

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



Terry Li
MBA, CFP (Canada)
Head of Bancassurance
DBS Bank Hong Kong

Mr. Terry Li is currently the Head of Bancassurance for DBS Bank HK, managing the overall P&L of MFP, life and general insurance business lines across retail, high-net-worth and commercial customer segments. As the appointed Responsible Officer of the bank, Terry also represents the bank as the key liaison officer to regulatory bodies including IA, HKFI, HKMA and MAS.

Terry started his financial services career in Canada back in early 90's. After 10 years of work in distribution field with London Life, Great-West Life and Scotiabank in Canada, he moved onto Asian market with key focus in Bancassurance and Partnership businesses, and served in various country, regional and global roles with Prudential, HSBC, Citi and Standard Chartered.

Terry is an MBA graduate from Ivey Business School, University of Western Ontario, and got his CFP (Canada) certification since 1999.

“Live to 120?”

28 NOVEMBER 2018 (WEDNESDAY)

Hotel ICON, Silverbox Ballroom, Level 1
17 Science Museum Road, Tsimshatsui East, Kowloon, Hong Kong

Name :

Company Name :

Company Address :

Contact Person :

Tel :

Fax :

Email :

	Registration Fee (HK\$)
ASHK Member 	<input type="checkbox"/> HK\$ 1,100
HKRSA Member 	<input type="checkbox"/> HK\$ 1,100
Non Member	<input type="checkbox"/> HK\$ 1,600

Registration Fee (Deadline for Registration : 19 November 2018)

Cheque made payable to “The Actuarial Society of Hong Kong” should be sent to us by mail at 1803 Tower One, Lippo Centre, 89 Queensway, Hong Kong on or before **19 November 2018**.

Cancellation Policy

Cancellations should be made by contacting Ms. Annie Chan at anniechan@actuaries.org.hk and also confirmed in writing. No refunds will be made for cancellations after **19 November 2018**. The Society reserves the right to cancel the seminar if conditions warrant.

Continuing Professional Development (CPD)

This Seminar may qualify for Continuing Professional Development (CPD). A maximum of 3 CPD hours* can be claimed. The amount of hours recorded is left to the discretion of the individual.

* 1 CPD hour = 60 minutes

Please return your completed form with appropriate payment to Ms. Annie Chan:

The Actuarial Society of Hong Kong

1803 Tower One, Lippo Centre, 89 Queensway, Hong Kong

TEL: (852) 2147 9278 FAX : (852) 2147 2497

EMAIL: anniechan@actuaries.org.hk