

Innovation in Member Engagement

策略與創新-實現與強積金/退休金成員之互動體驗

In a post-pandemic era where digital experience is the new normal, the pandemic has accelerated innovation and facilitated transformation. In the journey of retirement planning, what changes in expectation and habits of MPF and ORSO members as they manage their accounts? How can the industry enhance engagement with members so as to raise their awareness for managing their own pension? What can be done to better prepare the industry for the eMPF platform? In this webinar, you will hear from our guest speakers across different industries (key industry player, information technology expert and creative digital consultant) to share insights on the latest market trends and explore strategies which would drive member engagement through innovation.

疫情加速各行各業的創新及促進其轉型，令數碼體驗成為新常態。在退休策劃的旅程上，強積金、職業退休計劃的成員在戶口管理期望與習慣上有何改變？業界又如何提升與成員的互動，令他們更關心自己的退休金，並為強積金業界進入「積金易eMPF」新里程做好準備？在這個網絡研討會，我們邀請到三位不同領域的專業人士，包括分別來自專注退休金業務及資訊科技界之專家與創意數碼顧問，一起分享市場的最新發展，並探討創新思維如何啟發企業與客戶互動的策略。

Speakers 嘉賓



Ms. Ka Shi LAU BBS

劉嘉時女士

FCG HKFCS MAoF SFHKS CTP



Mr. Sunny IP

葉子陽先生



Mr. Francis FONG

方保僑先生



Mr. Bob LEE

李德麟先生



Mr. Alan YOUNG

楊豪業先生

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Event Details 活動詳情

Date & Time: Thursday, 12 May 2022 | 11:00am – 12:00 noon
日期及時間: 2022年5月12日(星期四)上午11時至中午12時

Language & Fee : Cantonese | Free
語言及費用: 廣東話 | 全免

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Notes 注意事項:

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此網絡研討會可以申請CPD/CPT等同1小時的非核心培訓時間，但需要獲得相關認證機構批准。參加者必須使用與香港退休計劃協會註冊時之相同名稱及電郵地址登錄。

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Event Programme 流程表

11:00 – 11:10

Opening Presentation 歡迎辭

Ms. Ka Shi LAU BBS 劉嘉時女士 FCG HKFCS MAoF SFHKSI CTP
Executive Committee Member & Cross Straits Forum Convenor, HKRSA
香港退休計劃協會行政委員會成員及兩岸四地論壇召集人
Managing Director & CEO, BCT Group
BCT 銀聯集團董事總經理及行政總裁

11:10 – 11:50

Panel Speakers 主講嘉賓

Mr. Sunny IP 葉子陽先生
Partner, Deloitte Digital
德勤數字合夥人

Mr. Francis FONG 方保僑先生
Founding and Honorary Chairman, Hong Kong Association of Interactive Marketing
香港互動市務商會創會及榮譽會長
Honorary President, Hong Kong Information Technology Federation
香港資訊科技商會榮譽會長

Mr. Bob LEE 李德麟先生
Business Strategy Sub-com Member, HKRSA
香港退休計劃協會業務策略小組委員會成員
Deputy CEO, BCT Group
BCT 銀聯集團副行政總裁

11:45 – 11:57

Q&A 問答環節

11:57 – 12:00

Closing Remarks 致謝辭

Mr. Alan YOUNG 楊豪業先生
Executive Committee Member & Profile & Events Sub-com Chairman, HKRSA
香港退休計劃協會行政委員會成員及活動籌組小組委員會主席
Co-Head of Hong Kong & Head of Institutional Business, Greater China
香港聯席主管及大中華區機構業務負責人
Franklin Templeton Investments (Asia) Limited, Hong Kong
富蘭克林鄧普頓投資(亞洲)有限公司，香港



Ms. Ka Shi LAU BBS 劉嘉時女士 FCG HKFCS MAoF SFHKSI CTP

Executive Committee Member & Cross Straits Forum Convenor, HKRSA

香港退休計劃協會行政委員會成員及兩岸四地論壇召集人

Managing Director & CEO, BCT Group

BCT 銀聯集團董事總經理及行政總裁

Ka Shi Lau is the Managing Director & CEO of BCT Group (comprising BCT Financial Limited and Bank Consortium Trust Company Limited), a leading provider of MPF/ORSO products and best-in-class asset servicing for investment funds and pensions. With corporate governance, sustainability (including ESG), and sense of purpose as the foundation, BCT is committed to creating value for all stakeholders.

Graduated with an MBA from Cornell University in USA, Ka Shi is also a Fellow of Chartered Governance Institute (FCG), a Fellow of Hong Kong Chartered Governance Institute (HKFCGI), and a Senior Fellow of Hong Kong Securities and Investment Institute. She is a strong advocate of corporate governance and sustainability, retirement protection, social inclusion and diversity, and health care through active participation in government consultations, industry dialogues and conferences. Apart from being on the executive committee of the HKRSA and a Member of Academy of Finance, she also serves on other statutory and professional bodies including MPFA, SFC, HKTA, HKICPA, Our Hong Kong Foundation, Investor and Financial Education Council, and Asian Corporate Governance Association. Her public service roles have included Minimum Wage Commission, Hospital Authority, Women's Commission, PYN Eastern Hospital, FSDC and TDC. For recognition of her public and community service in Hong Kong, she was awarded the Bronze Bauhinia Star (BBS) by the HKSAR Government in 2013.

劉嘉時女士為 BCT 銀聯集團董事總經理及行政總裁。BCT 由「銀聯金融有限公司」及「銀聯信託有限公司」組成，是香港強積金 / 職業退休計劃的領先提供商，為環球投資基金和退休金提供卓越的基金行政服務。BCT 一直以企業管治、可持續發展（包括「環保、社會、管治」ESG）和企業使命感為基礎，致力為所有持份者創造價值。

劉女士為美國康乃爾大學工商管理碩士，並為英國特許公司治理公會及香港公司治理公會的資深會士、香港證券投資學會的傑出資深會員。她一直透過參與政府的諮詢工作、與業界的溝通及會議，積極推動與企業管治、可持續發展、退休保障、社會多元共融及醫療護理相關的議題。除了出任香港退休計劃協會的行政委員會成員及金融學院會員外，劉女士同時為多個法定及專業組織服務，當中包括強制性公積金計劃管理局、證券及期貨事務監察委員會、香港信託人公會、香港會計師公會、團結香港基金、投資者及理財教育委員會，及亞洲公司治理協會。劉女士亦有擔任多項公職，包括服務於最低工資委員會、醫院管理局、女性事務委員會、東區尤德夫人那打素醫院、香港金融發展局及香港貿發局。她於2013年獲香港特別行政區政府頒授「銅紫荊星章」(BBS)勳銜，表揚她對公眾及社區作出的貢獻。

Panel Speaker 主講嘉賓



Mr. Sunny IP 葉子陽先生

Partner, Deloitte Digital

德勤數字合夥人

Sunny is a Partner in Deloitte Digital leading up the Digital Strategy practice in Hong Kong, with over 18 years of experience in technology advisory and delivery.

He has extensive experience serving large financial services organizations and across various other industries in digital transformation, customer experience, innovation strategy, and launching new propositions.

葉子陽是德勤數字的合夥人，負責領導香港的數字化戰略團隊，在科技顧問和執行方面擁有超過18年的經驗。

他於幫助大型金融服務和其他行業機構就數字化轉型、客戶體驗、創新戰略和推出新產品與服務方面，擁有豐富實務經驗。



Mr. Francis FONG 方保橋先生

Founding and Honorary Chairman, Hong Kong Association of Interactive Marketing
香港互動市務商會創會及榮譽會長
Honorary President, Hong Kong Information Technology Federation
香港資訊科技商會榮譽會長

Mr. FONG Po Kiu, Francis has been working in information and communication technology industry for over 20 years and has introduced many pioneer products and technologies into Hong Kong. He is currently a Honorary President of Hong Kong Information Technology Federation; Founding & Honorary Chairman of Hong Kong Association of Interactive Marketing; President of Hong Kong Consumer Electronics Alliance; the Director of World Information Technology and Services Alliance; Founder of e-Learning Consortium; Convenor of Hong Kong Fintech Federation; Member of Standing Committee on Technological Developments, Office of PCPD; Member of Telecommunications Regulatory Affairs Committee (TRAAC), Office of the Communications Authority (OFCA); Member of Electronic Road Pricing Pilot Scheme in Central-International Expert Panel Sub-committee on Technology and Privacy Protection; Member of Management Committee on Smart Fund; Member of RTHK Programme Advisory Panel; Council Member of Oxfam Hong Kong; Members of Information Technology Committee, The Boys' & Girls' Clubs Association of Hong Kong, Innovation and Technology Business Management Committee, The Hong Kong Council of Social Service, IT Panel of Hong Kong Red Cross, etc.

Francis is also a columnist in am730, Hong Kong Economic Journal, Ming Pao, RTHK, and PC Market, and a presenter of Viu TV.

方保橋先生於資訊、通訊、科技及電子消費品市場工作超過二十年，引入過不少新科技產品，並創辦多個業界組織及為多個非營利機構擔任委員提供專業意見。現任香港資訊科技商會榮譽會長、香港互動市務商會創會及榮譽會長、香港消費電子產品聯盟創會會長、電子學習聯盟創辦人、世界資訊通訊與服務業聯盟董事、香港金融科技商會召集人、香港個人資料私隱專員公署科技發展常務委員會成員、電訊事務管理局辦公室電訊規管事務諮詢委員會成員、運輸署智慧交通基金管理委員會委員、運輸署香港電子道路收費國際專家小組屬下的科技及私隱保障小組成員、香港電台節目顧問團成員、樂施會董事會成員、香港小童群益會資訊科技委員會委員、香港社會服務聯會創新及科技業務管理委員會委員、香港紅十字會資訊科技委員會成員等。方先生於am730、信報、明報、香港電台、PCM等媒體撰寫專欄，及於Viu TV【Fintech全方位】擔任節目主持人。



Mr. Bob LEE 李德麟先生

Business Strategy Sub-com Member, HKRSA
香港退休計劃協會業務策略小組委員會成員
Deputy CEO, BCT Group
BCT 銀聯集團副行政總裁

Bob Lee, Deputy CEO of BCT Group, is responsible for formulating corporate wide business strategies and drive sustainable development of the group, with corporate governance, sustainability and compliance culture as the foundation. Before assuming the role of Deputy CEO, he had been the Chief Business Officer (CBO) as well as Chief Financial Officer (CFO) of BCT. Prior to joining BCT, he held key roles at various financial institutions including ORIX Group, Bank of Tokyo-Mitsubishi UFJ Group, First Pacific Bank and Bank of China Group. His regulatory/industry participation includes serving on the MPF Industry Schemes Committee of the MPFA and the Business Strategy Sub-committee of the Hong Kong Retirement Schemes Association. Bob pursued his undergraduate studies at York University in Canada and attained a Master's Degree in Finance from City University of Hong Kong.

李德麟先生為BCT銀聯集團首席業務總監，是高級管理層重要成員之一，負責制定以企業管治、可持續發展和合規文化為基礎的整體商業和財務決策。在擔任首席業務總監前，李先生是集團的首席財務總監。加入BCT前，他曾於多間金融機構擔任要職，包括歐力士集團、三菱東京日聯銀行、第一太平銀行及中國銀行集團。李先生亦參與監管機構工作或業界組織，包括強制性公積金計劃管理局的強積金行業計劃委員會，以及香港退休計劃協會的業務策略小組委員會。他畢業於加拿大約克大學，並於香港城市大學取得金融學碩士學位。



Mr. Alan YOUNG 楊豪業先生

Executive Committee Member & Profile & Events Sub-com Chairman, HKRSA

香港退休計劃協會行政委員會成員及活動籌組小組委員會主席

Co-Head of Hong Kong & Head of Institutional Business, Greater China

香港聯席主管及大中華區機構業務負責人

Franklin Templeton Investments (Asia) Limited, Hong Kong

富蘭克林鄧普頓投資（亞洲）有限公司，香港

Alan Young is the Co-Head of Hong Kong. He provides managerial oversight of the Hong Kong office for respective business units including Sales, Client Service, Marketing, Mid-back office operations. He executes and monitors the implementation of Board-approved business objectives, strategies, and plans and the effectiveness of organizational structure and controls.

Mr. Young is also the Head of Institutional Business, Greater China. He is responsible for overseeing distribution of the company's institutional products in Greater China. Based in Hong Kong, Mr. Young works closely with regional and country teams to develop and implement product distribution strategies across Core Asia and to support the growth of Franklin Templeton's institutional business.

楊先生負責管理監督香港辦事處各個業務部門，包括銷售、客戶服務、市場營銷及中後台運營。他執行並監督董事會批准的業務目標、戰略及計劃的實施，以及組織結構及控制的有效性。

他也是大中華區機構業務負責人。他負責監督公司機構產品在大中華區的分銷工作。楊先生常駐香港，與地區及國家團隊密切合作，在亞洲核心地區制定及實施產品分銷戰略，並為富蘭克林鄧普頓機構業務的增長提供支持。