

Postgraduate Diploma in Family Office and Succession Management

Programme Code: FN133A

Application Code: 2350-FN133A

2867 8476

pgdfosm@hkuspace.hku.hk

The programme aims to:

- provide students with a detailed understanding of the multifaceted aspects of family office management;
- equip students with the necessary skills to navigate the intricate landscape of family wealth management;
- cultivate family office professionals to address the evolving needs and complexities of affluent families and their enterprises.

R Applicants shall hold a bachelor's degree awarded by a recognized institution. Those with a business-related degree would have an advantage.

If the degree or equivalent qualification is from an institution where the language of teaching and assessment is not English, applicants shall provide evidence of English proficiency, such as:

- an overall band of 6.0 or above with no subtests lower than 5.5 in the IELTS; or
- a score of 550 or above in the paper-based TOEFL, or a score of 213 or above in the computer-based TOEFL, or a score of 80 or above in the internet-based TOEFL; or
- HKALE Use of English at Grade E or above; or
- HKDSE Examination English Language at Level 3 or above; or
- equivalent qualifications.

Applicants with other qualifications will be considered on individual merit.

Remark: Applicants with relevant academic and/or professional qualifications may approach the Programme Team for application of exemption.

\$ HK\$96,000
Application Fee: HK\$150

D 1 year to 2 years

English

Q Level 6

Certificate for Module (Family Office Management Strategy)

Programme Code: FN077A

Application Code: 2350-FN077A

2867 8476

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The programme aims to provide students with essential knowledge in family office management. It will discuss various issues regarding how to establish a family constitution; how to set up a family office in Hong Kong; inheritance, family and business knowledge; and how to handle stakeholders' disputes. The application of trusts in family offices and real-life cases will be discussed. After completing the programme, students can better understand the processes and contemporary issues related to family office management.

R Applicants shall hold a bachelor's degree awarded by a recognized institution. If the degree or equivalent qualification is from an institution where the language of teaching and assessment is not English, applicants shall provide evidence of English proficiency, such as:

- an overall band of 6.0 or above with no subtests lower than 5.5 in the IELTS; or
- a score of 550 or above in the paper-based TOEFL, or a score of 213 or above in the computer-based TOEFL, or a score of 80 or above in the internet-based TOEFL; or
- HKALE Use of English at Grade E or above; or
- HKDSE Examination English Language at Level 3 or above; or
- equivalent qualifications.

Applicants with other qualifications will be considered on individual merit.

\$ HK\$15,000 per programme
Application Fee: HK\$150

D 30 hours

English

Q Level 6 (Reg. No.: 22/000160/L6) Validity Period: 01 Mar 2022 - on-going

家族辦公室證書

課程編號: FN094A

報名代碼: 2340-FN094A

2867 8476

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本課程旨在令學員了解家族辦公室的功能和運作。透過家族辦公室實例個案，指導學員如何有效地為高淨資產客戶提供投資管理策略和執行的具體方案。

R 申請人應持有副學士學位/高級文憑或同等學歷。

申請人如持有其他同等學歷：或21歲以上及擁有三年理財及財富管理相關工作經驗者，學院將會作個別考慮。

\$ HK\$25,800
報名費用: HK\$150

D 99 小時

粵語輔以英語

Q 資歷架構級別: 3 資歷名冊登記號碼: 23/000234/L3
資歷名冊登記有效期: 2023年4月1日 - 持續有效

證書(單元: 家族辦公室成立及資產配置)

課程編號: FN095A

報名代碼: 2340-FN095A

2867 8476

ecfomwi@hkuspace.hku.hk

本課程旨在教授學員如何成立家族辦公室，相關的資產配置技巧與注意事項。課程內容包括家族辦公室的概念、營運模式、資產配置、策略選擇與執行步驟。完成課程後，學員能夠因應客戶需要，成立家族辦公室，並提供投資策略建議和訂立確切的執行計劃。

R 申請人應持有副學士學位/高級文憑或同等學歷。

申請人如持有其他同等學歷：或21歲以上及擁有三年理財及財富管理相關工作經驗者，學院將會作個別考慮。

\$ HK\$10,200
報名費用: HK\$150

D 39 小時

粵語輔以英語

Q 資歷架構級別: 3 資歷名冊登記號碼: 23/000235/L3
資歷名冊登記有效期: 2023年4月1日 - 持續有效

證書(單元: 家族辦公室之環球稅務及信託安排)

課程編號: FN096A

報名代碼: 2335-FN096A

2867 8476

ecfomwi@hkuspace.hku.hk

本課程旨在介紹學員家族辦公室之環球稅務及信託安排。透過教授相關的知識，讓學員了解信託法的概念、遺產及熱門國家的稅務條例要點。通過環球案例分享，學員能為高淨資產客戶提供環球稅務及信託安排的具體財務配置計劃。

R 申請人應持有副學士學位/高級文憑或同等學歷。

申請人如持有其他同等學歷：或21歲以上及擁有三年理財及財富管理相關工作經驗者，學院將會作個別考慮。

\$ HK\$7,800
報名費用: HK\$150

D 30 小時

粵語輔以英語

Q 資歷架構級別: 3 資歷名冊登記號碼: 23/000236/L3
資歷名冊登記有效期: 2023年4月1日 - 持續有效