



JULIA CHARLTON AND ALEXANDRA TRACY, ON BEHALF OF  
THE COMMONWEALTH CHAMBER OF COMMERCE HK AND  
THE FINANCIAL SERVICES RESEARCH GROUP

**cordially invite you to a Breakfast Panel event on the  
FSRG's new paper: Hong Kong Asset Management  
Trends and Opportunities 2021**

Hear about how the Hong Kong Asset Management sector continues to evolve in the areas of green finance, sustainable investment and global asset management whilst competitive forces in the Asia Pacific region continue to emerge.

**DATE: 10 DECEMBER 2021  
TIME: 8:00AM TO 9:15AM  
VENUE: THE HONG KONG CLUB, 1 JACKSON ROAD,  
CENTRAL, HONG KONG**

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**DOUBLE VACCINATION REQUIRED**



Keynote Introduction by Regina Ip

The event will begin with an introduction by Julia Charlton, followed by a welcome address from FSRG Chairman Alexandra Tracy.

**Keynote introduction:**

**The Honourable Regina IP LAU Suk-ye, GBM, GBS, JP**

The Hon. Mrs Regina Ip is a First Class Honor graduate in English of the University of Hong Kong in 1972. Her passion for learning drove her to study for three master degrees at different stages of her life: Master of Letters in Renaissance Poetry at the University of Glasgow; Sloan Management Program at Stanford University, and more recently a Master of Art in East Asian Studies at Stanford University. She joined the Hong Kong Government in 1975, rising to the position of Secretary for Security and resigned in 2003. On her return from further studies in the US, she established a think tank, Savantas Policy Institute, in July 2006.

She was elected as a Member of the Fourth Legislative Council (LegCo) in September 2008 and was re-elected in 2012 and 2016 respectively. She founded the New People's Party (NPP) in 2011 and was appointed as Non-Official Member of the Executive Council (ExCo) in 2012. She established the "Maritime Silk Road Society" (MSRS) in September 2015. In December 2016, Mrs Ip resigned from the Executive Council. She ran in both the 2012 and 2017 Chief Executive elections. She is a member of the Executive Council for the fifth term of the HKSAR Government. She was awarded Gold Bauhinia Star and the Grand Bauhinia Medal in 2002 and 2021 respectively.



**Featured Panellists:**

**Lili Wang, Managing Director, Finex Hong Kong Limited**

As the founding member and managing director of Finex Hong Kong Limited, Lili is in charge of global investors' relations and is an expert in Luxembourg domiciled fund and company structuring. Finex is a leading private placement platform providing APAC-based institutional investors access to global alternative investment opportunities.



**Karen Wong, Regional Director FundSettle Asia, Euroclear Bank**

Karen is currently an Operations Director at Euroclear Bank in Hong Kong, managing operations and client services for FundSettle. She joined Euroclear Bank in 2015 before which she was heading the Transfer Agency unit in Citibank Hong Kong. Karen has many years of experience in operations management, mainly in loan syndication, project finance, debt issuance and custodian functions.



**Leonie Kelly, Director & Head of Sustainable Investment Consulting, Ogier Global**

Leonie leads Ogier Global's Sustainable Investment Consulting team for private equity firms, asset managers, institutional investors, family offices and foundations working to integrate ESG and impact factors into operations and investment processes and to navigate sustainable investment policy and regulation. As a respected voice in the industry with more than 13 years of experience in sustainable finance, she is an advisor to Sustainable Finance Initiative Asia, a member of the Securities & Futures Commission Climate Change Expert Group, and an advisory board member of LumiVoce.





**Jason Chan, Senior Associate, Dechert**

Jason focuses on investment fund formation transactions, including hedge funds, crypto funds, private equity funds, real estate funds and retail funds. He is well experienced in advising on a diverse range of ongoing compliance, legal and regulatory matters related to the financial services industry in Hong Kong, with a particular focus on the regulatory and licensing requirements for fund managers in the virtual assets ecosystem. Jason is a committee member of the Investment Product and Financial Services Committee of The Law Society of Hong Kong.



**Ching Yng Choi, Board member, FSRG (moderator)**

Ching is a senior executive and consulting professional specialising in asset management, business development and public affairs across Asia and Europe. In the past decade, she has been instrumental in building awareness for European investment funds and linking public and private sectors to secure new market opportunities across Hong Kong and the Mainland, Taiwan, Singapore, and other distribution fund markets. Ching is also a Board member and Treasurer at FSRG, the Financial Services Research Group



**Julia Charlton, Chairman, Commonwealth Chamber of Commerce, Hong Kong**

Julia is the founding and managing partner of Charltons, an award-winning Hong Kong corporate finance Hong Kong law firm. Julia is admitted as a solicitor in Hong Kong, England and Wales and the BVI. She practises in the field of corporate finance, including M&A, private equity, securities, virtual assets and funds. She is also a member of the Commonwealth Enterprise & Investment Council (CWEIC)'s Global Advisory Council and several Hong Kong boards and committees, most notably The Takeovers and Mergers Panel and the Takeovers Appeals Committee of Hong Kong Securities and Futures Commission and the Listing Review Committee of the Hong Kong Stock Exchange. Julia is also a Senior Fellow of the Hong Kong Securities and Investment Institute.



**Alexandra Tracy, Chairman, FSRG**

Alexandra is President of Hoi Ping Ventures in Hong Kong, which she founded to provide research and consulting on green finance and sustainable investment in Asian emerging markets. She is currently Private Sector Observer to the World Bank's Climate Investment Funds, having served as an Active Private Sector Observer to the United Nations Green Climate Fund. Alexandra is a director of RIMM Sustainability Pte Ltd in Singapore and sits on a number of advisory boards in Hong Kong, including for the Asia Pacific Investors Cooperation, the Hong Kong University of Science & Technology's Asian Family Business Research Centre, Friends of the Earth Hong Kong and Carbonless Asia. She is also a director of the Climate Markets & Investment Association in the UK and advisor to the NDCl.org climate commitment community. From 2013 to 2019, Alexandra was a member of the Listing Committee of the Hong Kong Stock Exchange. She acted as non-executive Chairman of the Association for Sustainable & Responsible Investment in Asia for six years, stepping down in 2015 and was instrumental in establishing the Asia Investor Group on Climate Change during this period. Alexandra speaks and writes regularly on sustainable finance, development and infrastructure issues.

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