



Irish Chamber of Commerce  
of Hong Kong

# WEALTH MANAGEMENT

## TIPS, TRIPS AND TRAPS

6:30-8:30 pm,  
Mon, 17 September

24/F, Club Lusitano,  
16 Ice House Street,  
Central, Hong Kong

### Hosted by

**Kevin Kitching, Chairman,  
The Irish Chamber of Commerce of Hong Kong**

Wealth protection and investment planning is critical in times of higher global tax levels and lower investment returns. The same pressures are there. Children's education. Retirement. Risk of divorce. Or even death.

This event will provide you with a forum in which to consider how best to face these issues, and to hear the insight of experienced financial advisers. Our panel will update you on current trends in personal asset and investment portfolio management across different asset classes, and will highlight what you need to consider now, so you have less to worry about later.

### Our panellists are

#### **Joe Kelly, Financial Partners Ltd**

Joe specialises in comprehensive financial planning for expatriates. He is fully qualified in Hong Kong, U.K. and Ireland. Joe deals across the full spectrum of financial planning including protection of individual wealth, family offices & business succession planning. He also specialises in enhanced tax-free pension planning, and providing off-shore wealth creation and preservation.

#### **Yuseff Murphy, Sovereign Trust**

Yuseff Murphy is the Business Development Manager for Sovereign Trust (Hong Kong) an international provider of cross border wealth management services. With the core business being the creation and management of companies, trusts funds, pensions and other structures to meet the specific personal or business objectives of our clients. Yuseff specialises in retirement and succession planning and will be sharing tips with you on how to achieve this.

#### **Timothy Haywood, Walton International**

Walton International is one of North America's leading real estate investment groups, creating land-based real estate investments for individual and institutional investors worldwide. Tim is responsible for developing new intermediary distribution channels and providing product training, sales support and client servicing support to wealth managers, financial advisers & their clients.

#### **Neil McCormick, Carey, Suen & Associates**

Neil heads the general insurance division for Carey, Suen & Associates, a Hong Kong licensed independent insurance brokerage. Neil has particular experience in corporate insurance lines, including business package, PI, D&O, key man, shareholder protection and critical illness cover. He also specialises in helping individuals with their individual protection needs including local and international health insurance.

**This event will be of particular interest to you if you are considering your current personal financial planning options, and would like insight on available options.**

Please register below as soon as possible.  
This is a popular event so seats may be limited.

**Members**  
HK\$250

**Event Contact:** [events@irishchamber.hk](mailto:events@irishchamber.hk)  
**Payment online at** [www.irishchamber.hk/events](http://www.irishchamber.hk/events)

**Non-members**  
HK\$350