



THE ASSOCIATION OF
**HONG KONG
ACCOUNTANTS**
香港會計師專業協會

*(a member of The Association of Hong Kong Accountants Limited,
incorporated in Hong Kong as a company limited by guarantee)*

Unit E6, 2/F.,
Hong Kong Industrial Building,
444-452 Des Voeux Road West,
Hong Kong
Tel: (852) 3520 2546
Email: ahka_enrolment@ahka.hk
Website: www.ahka.hk

**Physical Seminar on
“Strengthening Audit Practices and Budget Strategies”**

Speakers:

Ms. Loretta Fong
Sustainability Assurance Leader, PwC Hong Kong

Ms. Traly Yuen
Financial Controller, Playright Children's Play Association

Panelist Member:

Mr. Patrick Lee
Finance Director, Christian Family Service Centre

Moderator:

Mr. Eugene Liu
Past President, AHKA

(Course Code : 242025)

Part 1

Highlights:

What are the key considerations for auditing NGOs? With the changing regulatory environment, notably understanding where the auditors are coming from will help facilitate a smooth audit and adding value to the process.

Part 2

Effective budgeting and financial oversight are critical to the success and credibility of nonprofit organizations. This seminar is tailored for NGOs seeking to enhance their financial planning, regulatory compliance, and long-term sustainability.

Key Topics Covered:

Financial Management Principles: Build a strong foundation for responsible stewardship

- a) Budgeting Process: Step-by-step guidance for preparing a yearly budget
- b) Total Cost Structure: Break down expenses across staffing, programs, operations, and contingency
- c) Cash Flow Management: Maintain liquidity and plan for financial stability
- d) Recommendations & Best Practices: Practical tips for transparency, stakeholder trust, and adaptive planning

This seminar offers actionable insights for NGO leaders, finance officers, and program managers to align budgeting with mission goals, meet regulatory expectations, and build resilient financial systems.

Special emphasis will be placed on long-term sustainability: budgeting for ongoing operations, monitoring financial health, and adapting to changing circumstances. Attendees will gain practical insights into stakeholder communication, transparency, and building trust through responsible financial planning. Join us to elevate your financial strategy and drive meaningful change in your organization.



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Supporting Organizations:



基督教家庭服務中心
Christian Family Service Centre



基督教香港信義會社會服務部
Evangelical Lutheran Church
Social Service - Hong Kong



香港基督教服務處
HONG KONG CHRISTIAN SERVICE
全人關心 卓越創新
care for all excel in all



香港傷健協會
Hong Kong PHAB Association



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S.K.H. St. Christopher's Home
傳愛 傳希望



基督教協基會社會服務
THE CHURCH OF UNITED BRETHREN IN CHRIST
SOCIAL SERVICE



香港勵志會陳融晚晴中心
The Endeavourers HK Bert James
Young Neighbourhood Elderly
Centre



香港青年協會
the hongkong federation of youth groups

65th



香港復康會
The Hong Kong Society
for Rehabilitation



香港心理衛生會
The Mental Health Association of Hong Kong



**WORLD
CHARITY
SOCIETY**
世界慈善協會



香港中華基督教
青年會



循道衛理楊震社會服務處
YANG MEMORIAL METHODIST SOCIAL SERVICE

Date:	10 October 2025 (Friday)	
Time:	6:30pm - 8:30pm (6:15pm Registration)	
Venue:	PwC Hong Kong Office 21/F, Edinburgh Tower, The Landmark, 15 Queen's Road Central, Hong Kong	
Medium:	Cantonese	
CPD Hours:	2 hours	
Enrolment Fee:	HK\$200	Member of AHKA
	HK\$200	Member / Staff of Supporting Organizations
	HK\$300	Non-member / Others
Online Enrolment:	Please Click Here	
Deadline:	8 October 2025 (Wednesday)	

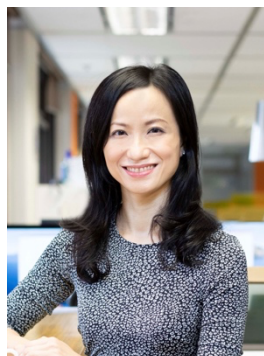


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About the Speakers:-



Ms. Loretta Fong
Sustainability Assurance Leader, PwC Hong Kong

Loretta is the Sustainability Assurance Leader of PwC Hong Kong. The Sustainability team consists of multinational professionals leveraging on business know-how to drive transformative and innovative solutions for our clients.

Loretta has been practising as an assurance partner in Hong Kong for over 15 years, and has extensive experience in providing accounting, audit and transaction advisory services to private and publicly listed entities in Hong Kong and the United States. She used to lead the entrepreneurial assurance group while focusing on sustainability reporting and assurance since 2022.

Loretta is held office of the President of the Hong Kong Institute of Certified Public Accountants (HKICPA) in 2022 - 2023. She is a member of the Green Technology and Finance Development Committee chaired by the Financial Secretary of the Hong Kong SAR, a co-opt member of the Sustainability Committee of the Urban Renewal Authority, and a member of the Advisory Board of Hong Kong Management Association's Global Centre for ESG Education and Research.

Her strong international background and knowledge gained has assisted her in fulfilling her duties and responsibilities as a council member and the treasurer of the Hong Kong Polytechnic University (2019 -2025), a board member of the Ocean Park Corporation (2016 - 2022) and a council member of the General Committee of the Federation of the Hong Kong Industries (2019 – 2025), as appointed by the Government.

Loretta holds a number of professional designations including CPA (practicing) Hong Kong (HKICPA), Certified Public Accountant in the United States (CPA (US)), Chartered Professional Accountant (CPA Canada), Chartered Financial Analyst (CFA), and CICPA (non-practicing) in Chinese Mainland.



Ms. Traly Yuen
Financial Controller, Playright Children's Play Association

Ms. Traly Yuen is a seasoned finance professional with more than 25 years of experience across NGOs, global corporations, and asset management. Currently, she serves as the Financial Controller at Playright Children's Play Association, where she oversees financial operations, strategic planning, audits, and across the organization.

Her career includes senior roles at The Neighbourhood Advice-Action Council and Deloitte Touche Tohmatsu, where she managed multi-entity financial portfolios, led system migration projects. She holds a Master's and Bachelor's degree in Accountancy from the University of London and the University of Bolton respectively. She is a Certified Public Accountant (CPA) and a fellow member of the Association of Chartered Certified Accountants (ACCA) and a member of the Association of Hong Kong Accountants.

Known for her strategic thinking, team leadership, and deep understanding of NGO funding frameworks, She brings a wealth of insight into financial governance, system implementation, and sustainable development.



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About the Panelist Member:-



Mr. Patrick Lee

Finance Director, Christian Family Service Centre

Over 25 years of global financial leadership spanning multinational corporations, banks, universities, and NGOs. Currently leading Finance at Christian Family Service Centre while chairing the Finance & Governance Committee at Playright Children's Play Association.

Proven track record as the former Associate Director of Finance at the University of Hong Kong, CFO and Executive Director of Damin International Holdings, Senior Treasury Manager at Swire Pacific, and Senior Vice President, Global Finance at HSBC. Holds an MBA and dual Bachelor's degrees in Commerce and Computer Science. Patrick is a member of Hong Kong Institute of Certified Public Accountants (HKICPA) and Association of Hong Kong Accountant (AHKA).

Has received accolades including the 2022 Sing Tao Leader of the Year Award and been nominated for two Adam Smith Awards for innovative treasury projects. Expertise in strategic financial planning, cross - border capital management, AI - driven business intelligence, and NGO governance. Adept at bridging commercial acumen with social impact and having a passion for mentoring emerging financial leaders.

Enrolment Form

To : The Association of Hong Kong Accountants

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Enquiries : 3520 2546

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10 October 2025 (Friday)

☐ Member of AHKA (No.: _____)

☐ Member / Staff of Supporting Organizations

☐ Non-Member / Others

Full Name : _____

Firm's Name : _____

Mobile Phone No. : _____ Email: _____

Enrolment Fee:	Member of AHKA	HK\$200
	Member / Staff of Supporting Organizations	HK\$200
	Non-Member / Others	HK\$300

Cheque No.: _____ Bank: _____ Amount: HK\$_____

Signature: _____ Date: _____

Please complete the enrolment form together with your cheque for the full amount made payable to
“The Association of Hong Kong Accountants Limited” and send to Unit E6, 2/F., Hong Kong Industrial Building, 444-452 Des Voeux Road West, Hong Kong

Notes:

1. Enrolments for the seminar are accepted on the first-come-first-served basis. Priority will be given to AHKA's members or associates and member / staff of supporting organizations.
2. Confirmation will be sent by email one or two day before the date of the seminar.
3. If Typhoon Signal No. 8 or higher / Black Rainstorm warning is hoisted, the seminar will be postponed and new arrangement will be announced.
4. **Personal data** collected from the enrollee may be used by the Association to inform you of this seminar, and any other training activities, the benefits, goods, services, facilities and events to be organized or provided by the Association. An enrollee may opt out from receiving such materials at any time by sending a letter to the Association's privacy officer.
5. **Once application is successful, fees are non-refundable and seats are non-transferable.**