



THE ASSOCIATION OF
HONG KONG
ACCOUNTANTS

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

Supporting Organisation:



香港財務策劃師學會
INSTITUTE OF FINANCIAL PLANNERS OF HONG KONG

Physical Seminar on
“Sustainable Legacy: Holistic Approach for Family Office Development”

Speakers:

Mr. Allan Lee

Vice President (Professional Training and Governance)
Head, Family Governance Center
Legacy Academy

Dr. Ricky Lee

Founder and CEO, Jadeite Family Office

Mr. Alan Chow

Partner, Tax Services
Acclime Tax Advisory (Hong Kong) Limited

(Course Code : 162026)

Highlight:

1. Key trends and development of family office industry in Hong Kong
2. The seven values of wealth from holistic wealth philosophies
3. Holistic family legacy planning for effective succession
4. Key future trends of family office industry

Date: 28 May 2026 (Thursday)

Time: 6:30pm – 8:30pm (6:15pm Registration)

Venue: Acclime Limited office

(Address: 10/F., Lee Garden Three, 1 Sunning Road, Causeway Bay)

Medium: Cantonese

CPD Hours: 2 hours

Enrolment Fee: HK\$200 Member of AHKA / IFPHK

HK\$300 Non-member or Others

Online Enrolment: Please [Click Here](#)

Deadline: 26 May 2026 (Tuesday)

About the Speakers:-



Mr. Allan Lee
Vice President (Professional Training and Governance)
Head of Family Governance Center
Legacy Academy

Mr. Allan Lee is the Vice President (Professional Training and Governance) and the Head of the Family Governance Center of Legacy Academy. He is a Master Family Legacy Planner who is responsible for family legacy consultancy and training services. He specialises in family governance and research on success factors of Japanese enterprises with longevity. He is a legacy book writer and was the RTHK CIBS program host for the Program “Uprising Second Generations”. In early 2026, he co-authored the definitive industry book 《一瑄談家辦 — 與你一起定義財富與傳承》 (The Jadeite Perspective: Redefining Wealth and Legacy), which provides deep insights into the evolution of family office management and the core values of legacy.

Mr. Lee is the Faculty Advisor of HKU Business School. He is also a frequent speaker for the topics of family office and family legacy. He acted as a guest speaker for the Guest Lecture of Special Topic “Accounting for Family Business” in Financial Reporting course at Master of Accountancy Programme at the HKU Business School in 2026 and the Family Business Innovation and Succession of the EMBA Master Class of City University of Hong Kong in 2022. He was also the Visiting Lecturer (part-time) at the College of Professional and Continuing Education of the Hong Kong Polytechnic University and the Visiting Lecturer at the Institute for Entrepreneurship of the Hong Kong Polytechnic University, teaching the Family Legacy Facilitator course, and the Honorary Research Associate at the Chinese Family Succession Research Center of The Hang Seng University of Hong Kong.

About the Speakers:-



Dr. Ricky Lee
Founder and CEO, Jadeite Family Office

Dr. Ricky Lee is the Founder and CEO of Jadeite Family Office, bringing over 20 years of expertise in the financial planning and asset management industry. A highly credentialed leader, he holds an EMBA and several prestigious professional designations, including Certified Private Banker (CPB), Certified Financial Planner (CFP), and Certified Trust Practitioner (CTP).

Dr. Lee earned his Doctor of Business Administration (DBA), focusing his doctoral research on "The Succession Principles in Asian Family Offices for a Sustainable Transition," a specialised study of the wealth preservation landscape in Hong Kong. In early 2026, he co-authored the definitive industry book 《一瑄談家辦 — 與你一起定義財富與傳承》 (The Jadeite Perspective: Redefining Wealth and Legacy), which provides deep insights into the evolution of family office management and the core values of legacy.

A forward-thinking practitioner, Dr. Lee is a vocal advocate for the integration of AI in finance to optimise advisor workflows and elevate client service standards. His influence extends across the Greater Bay Area's professional and civic networks, highlighted by his induction into the Order of the Knights of Rizal.

As a recognised thought leader, Dr. Lee is frequently featured across global media platforms, including TV, radio, newspapers, and YouTube. He is a sought-after speaker at major seminars across Hong Kong, Mainland China, the UK, and Australia, where he shares his expert perspective on the definition of wealth, the strategic role of family offices, and the complexities of generational wealth transfer.



Mr. Alan Chow
Partner, Tax Services
Acclime Tax Advisory (Hong Kong) Limited

Alan is specialized in international tax and business advisory services, in particular, PRC and Hong Kong tax advisory services. Alan has over 19 years' experience in taxation, prior to joining Acclime Tax Advisory (Hong Kong) Limited (formerly known as RSM Tax Advisory (Hong Kong) Limited), he has worked in Ernst & Young and other international accounting firms.

Alan is experienced in handling cross border tax advisory services such as cross-border investment structure, group restructuring, tax due diligence, transfer pricing, tax dispute, etc. to private and listed groups in various sectors. Alan is a member of the Hong Kong Institute of Certified Public Accountants.

Enrolment Form

To : The Association of Hong Kong Accountants

Email : ahka_enrolment@ahka.hk

Enquiries : 3520 2546

Physical Seminar on
“Sustainable Legacy: Holistic Approach for Family Office Development”
Course Code: 162026
28 May 2026 (Thursday)

- Member of AHKA (No.: _____)
- Member of IFPHK (No.: _____)
- Non-Member or Others

Full Name : _____

Firm's Name : _____

Mobile Phone No. : _____ Email: _____

Enrolment Fee:	Member of AHKA / IFPHK	HK\$200
	Non-Member or 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 / member of IFPHK.
2. **Confirmation will be sent by email one or two day before 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.**