HKU FAMILY WEALTH MANAGEMENT 港大家族財富管理

FAMILY X WEALTH

HKU Master of Family Wealth Management Newsletter
#wherefamiliesandwealthcrossover

JUN 2025 ISSUE 001

Welcome to the inaugural edition of the HKU Master of Family Wealth Management Newsletter. We are a full-time, one-year taught master's programme at The University of Hong Kong. In this newsletter, we recap some of the activities and key highlights since the launch of our programme in September 2024. We would also like to take this opportunity to thank all our industry friends who contributed to the education of our graduating students!

Celebrating the 1st FWM Orientation

On 28 August 2024, the HKU Master of Family Wealth Management programme held the first student orientation at May Hall, The University of Hong Kong, welcoming our first intake class to this interdisciplinary programme.

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Exploring the World of Team Dynamics

Families are a type of teams, and as a Master programme in family wealth management, learning how to collaborate with others is an integral part of our curriculum. As part of our student induction, the newly admitted HKU Master of Family Wealth Management students attended an Offsite Retreat from 29 to 30 August 2024 to explore the importance of group dynamics.

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In many courses at FWM, we invite distinguished experts and scholars from different fields to share their rich industry experience or research results related to family wealth management at May Hall. One of the most important components of the FWM programme is that our students will have the opportunity to interact with industry experts at close range and build in-depth relationships with them. Below we show just a small selection of the guest speakers who graced the classrooms at May Hall over the past academic year

On 22 October 2024, we kicked off our first class of "Current Issues in Family Office Management" with a special guest speaker Angel Chia, Executive Director of the Hong Kong Academy for Wealth Legacy.

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On 29 October 2024, David Cameron and Aoife Griffin, both partners of David Cameron Law Office, shared their insights on the family office industry with our students in the class of "Current Issues in Family Office Management".

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On 5 November 2024, Ronald Chan, Founder and CIO of Chartwell Capital visited May Hall and had a cordial interaction with our students, as part of the "Current Issues in Family Office Management" course.

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The world of family wealth management is so rich that different possibilities overlap. In November 2024, we were delighted to have experts from various disciplines discuss these exciting possibilities in the "Current Issues in Family Office Management" course.

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On 24 November 2024, Professor Geoffrey Jones from Harvard Business School shared his expertise with our students and delivered a captivating public lecture on capitalism and resilience.

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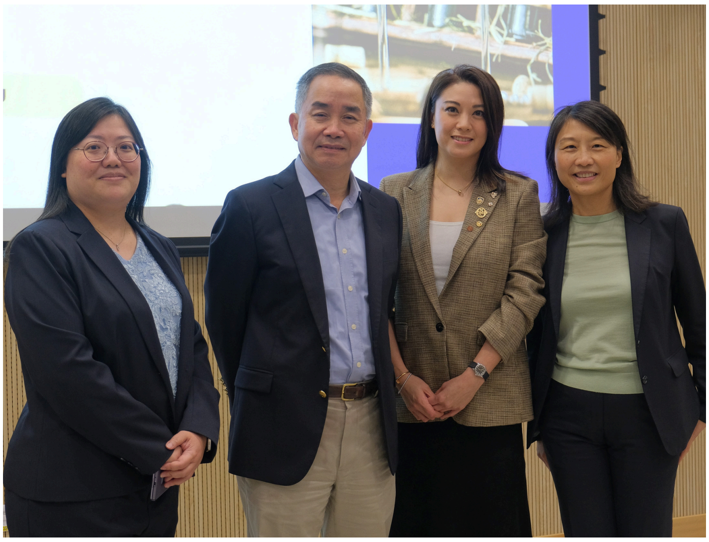

On 26 November 2024, our programme held a special event in May Hall. To give our students an in-depth experience of passion investment, a Wine Investment Talk was held on this day and we had the honour of inviting Bernice Liu to share her insights and experiences on wine investment.

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During the last week of November 2024, we were fortunate to have distinguished guests visit May Hall and speak with our students, capping off a remarkable month in this storied and elegant building.

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How to define "wealth"? What is truly valuable, especially to ultra-high net worth families? Good stewards of family wealth need a unique perspective that not only knows how to manage those tangible assets, but also how to combine them with philanthropy, sustainability and social impact for the benefit of the wider community to help families grow legacies across generations.

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On March 2025, Dr David von Eiff from CFA Institute delivered a lecture entitled "Understanding Sustainable Finance" to students of our elective course "Philanthropy and Social Impact Investing".

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Rich and interdisciplinary co-curricular activities are also integral components of the FWM program. Some of these activities aimed to broaden the knowledge of future leaders in the family wealth management industry regarding the nature of wealth, while others provide them with firsthand insights into the industry.

Unveiling Business History of Hong Kong

On 12 March 2025, we successfully concluded one of our elective courses "Business History and Best Practices", with unforgettable visits to some of Hong Kong's most significant historical archives.

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Exploring Connections between Wealth and Spirituality

The elective course "Faith, Religion and Leadership" brought our students to explore religious institutions in Hong Kong and their relationships with families and donors.

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Visiting Asia's Leading Multi-Family Office

On 28 April 2025, students of HKU Master of Family Wealth Management Programme were fortunate to be invited by Raffles Family Office to visit their office in Central, Hong Kong.

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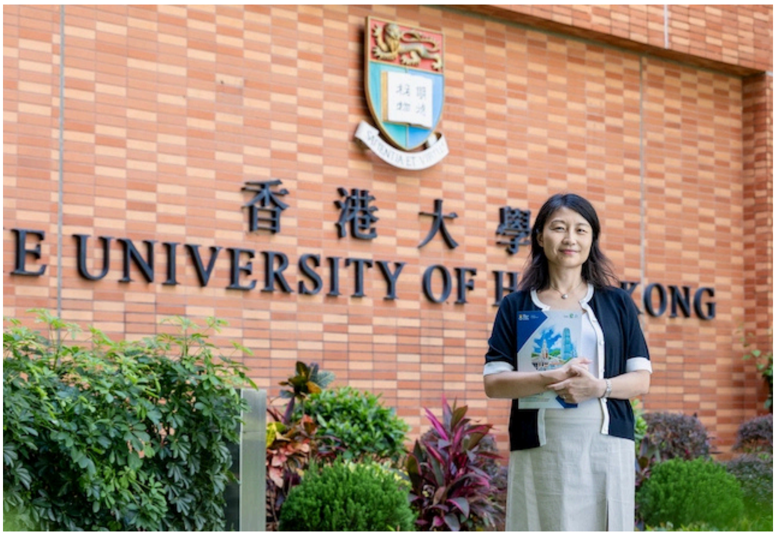
"We are a unique program – the programme has an interdisciplinary slant and is at the intersection of business history and social sciences."



HKU Master of Family Wealth Management Programme Director Bonnie Leung was interviewed by GMAC's *BusinessBecause* in the article on the article "Master Of Family Wealth Management Program Review: Curriculum, Careers & Application".

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"Keep learning, networking, and adapting."

Our Programme Director, Bonnie Leung, moderated a panel during the "Career Paths on the Family Office Ecosystem" event hosted by the HKU Business School, shedding light on this pivotal aspect of modern wealth management.

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Our story is ongoing. Stay connected by following our social media channels for the latest updates on our programme.