



FOAHK 2023 CASE COMPETITION

SUSTAINABLE PORTFOLIO MANAGEMENT

Looking for exposure to different
FINANCIAL FIELDS?

Welcome to the FOAHK 2023 Case Competition, the first family office-focused case competition in Asia!

Participants will have access to exclusive training webinars and the opportunity to work closely with industry veterans. Shortlisted teams will receive mentorship from experts in private banks, family offices, and asset management firms, and will have the chance to present their ideas to seasoned industry professionals.

Join us for the chance to earn summer internship offers and fast-tracked opportunities at leading investment banks, family offices, asset management firms, and more!

KEY TIMELINE 2023

- Registration Deadline:** 17 Feb 2:00 pm (HKT/GMT)
- Exclusive Webinar:** 18 Feb 10:30 - 11:30 am (HKT/GMT)
- Round 1 Release:** 19 Feb 12:00pm (HKT/GMT+8)
- Round 1 Deck Submission:** 26 Feb 12:00pm (HKT/GMT+8)
- Round 2 Release:** 02 Mar 12:00pm (HKT/GMT+8)
- Round 2 Deck Submission:** 10 Mar 12:00pm (HKT/GMT+8)
- Round 2 Presentation:** 11 Mar (Details to be announced)

SCAN QR CODE
TO JOIN NOW!



FSDC x FOAHK 2022 Summer Internship Program:
<https://www.foahk.org/internships>

✉ case.competition@foahk.org

Family Office Association Hong Kong (FOAHK)

WHO WE ARE

FOAHK is an independent family office trade association established in November 2020. As a non-profit consultative industry body, FOAHK represents family offices serving ultra-high-net-worth (UHNW) individuals and their families on governance, legislative, and regulatory matters.



Ms. Angel Chia
Chair of FOAHK & Chief
Strategy Officer of
Fountainhead Partners



Mr. Grant Ko
Chair of Education &
Research Sub Committee of
FOAHK & Chairman of
Wisdom Group Holdings

WHO WE'RE LOOKING FOR

HK, SG, China, or US students with an interest in the Family Office Industry, Portfolio Management, and ESG Investment. Cross-region teams are not allowed.

CASE COMPETITION PROCESS

1. Form a team of 3-4 students from any of the universities based in Hong Kong, China, Singapore, or the United States. **Year 2 or above is preferred.**
2. Register by filling the application form and sending email to case.competition@foahk.org before **17th February 2023, 12:00PM HKT.**
3. The case competition comprises of two rounds:
 - a. Round 1 will be focusing on portfolio management and ESG investment. First-round case will be distributed on **19th February 2023, 12:00PM HKT.**
 - b. Round 2 will be adding on the application of ESG strategies in family office from a corporate level, fund analysis and family office services that can add value to the client's portfolio. Shortlisted six teams will receive the second-round case on **2nd March 2023, 12:00PM HKT.**
4. Participants are advised to consult a supervisor on the case competition. In Round 2, each team can arrange meetings with industry mentors assigned by FOAHK.
5. Students are highly encouraged to include ideas besides the materials provided to enrich their pitch.

Champion

PRIZE SPONSOR



- FOAHK **Summer Internship** offer
- Full certification sponsorship of **Certified ESG Planner CEP®** from International Chamber of Sustainable Development (ICSD) and HK Management Association (market price: **5,000 HKD**)

Top 3

- Investment Bank, Asset Management Firm and FinTech Company Summer Internship **fast-track opportunities**
- FOAHK Summer Internship **fast-track opportunity**
- FOAHK 2023 Internship company **onsite visits** opportunities
- Prize award (Champion: **8,000 HKD**/team, 1st Runner up: **6,000 HKD**/team, 2nd Runner up: **4,000 HKD**/team)

Finalists

- Certificate and recommendation letter from FOAHK

Language and Presentation Requirements

- All presentation decks and oral presentations should be conducted in **ENGLISH** only
- Participants should submit their Powerpoint deck in PDF format, less than 10 slides (excluding cover page, agenda, and executive summary), and a font size of at least 16 and 1.0 line spacing
- Final oral presentation will be in English (20-min presentation + 15-min Q&A) on 11th March 2023 to judges from industry and government using hybrid method, which teams in Hong Kong will conduct presentation physically, teams out of Hong Kong virtually

Time: 10:30-11:30AM HKT, 18 Feb



Dr. Mike Hui presenting
Sustainable Investment

Dr. Mike Hui
Founding Vice Chairman of ICSD &
Sustainable Finance Advisor of Wisdom Group Holdings



Mr. Frank Tsui presenting
Portfolio Management

Mr. Frank Tsui
Managing Director, Head of ESG Investment,
Value Partners Group

EXCLUSIVE WEBINAR

LEARNING OUTCOME

What you'll gain from this experience

- ✓ What is family office and why family office
- ✓ How a family office plays its role in creating long-term values for clients
- ✓ How to construct a portfolio based on clients' requirements under current macro environment
- ✓ How ESG investment can be incorporated into clients' portfolios
- ✓ How sustainability works beyond investment in the corporate level in a family office

INTERNSHIP FAST-TRACK OPPORTUNITIES



INDUSTRY MENTORS



Ms. Jessica Jones
MD, Head of Asia,
PGIM Investments



Mr. Morgan Lau
Portfolio Manager,
Fidelity International



Mr. Jacky Leung
MD, Head of Product
Management Group,
HK, Bank of Singapore



Mr. Frank Tsui
MD, Head of ESG
Investment,
Value Partners Group



Mr. Harry Walker
VP & Regional Director,
HK, Dimensional Hong
Kong Limited



Mr. Kong Wong
CIO & Co-founder,
Topaz Family Office

JUDGING PANEL



Dr. Au King-lun
Executive Director,
Board Member, FSDC



Mr. Grant Ko
Chair of Education &
Research Sub Committee
of FOAHK &
Chairman of Wisdom
Group Holdings



Ms. Carrie Ng
Head of Sustainable
Finance, HSBC Hong
Kong Commercial
Banking



Mr. Seungjoo Ro
Head of ESG
Research, CLSA, HK



Mr. Sandro Treier
Head Intermediaries
Greater China,
Julius Baer



Mr. Brendan Tu
MD, Global Banking &
Head of ESG Advisory
APAC & Chairman of
General Industrials
Group, Asia, UBS AG



Mr. Freddy Wong
MD & Head of Asia
Pacific,
Invesco Fixed Income

Terms and Conditions

1. By participating in the ‘FOAHK 2023 Case Competition – Sustainable Portfolio Management’ host by Family Office Association Hong Kong (from here on known as the “Case Competition” or the “Competition”), you agree to all of these Terms and Conditions below which are subject to change by FOAHK at any time without notice.
2. Register through filling in the application form by 17 February 2023 2:00pm HKT at <https://58wf8cwmbstv.typeform.com/to/HTVMnTX2>.
3. The Competition is open to students who meet the following criteria:
 - Students must register in teams of 3 to 4 members, which students in Year 2 or above are preferred.
 - Enrolled in a Bachelor’s degree program in universities located in Hong Kong, China, Singapore or the United States.
 - Teams from Hong Kong who are shortlisted to the Second Round must have all their Team Members conduct presentation physically, while teams outside of Hong Kong must conduct presentation virtually.
 - Each team can include students from different universities within the same regions. However, cross-region is not allowed.
 - The Competition will be held completely in English.
 - Students are advised to consult a supervisor during the Competition for both rounds.
 - Each team must nominate a ‘Team Captain’ who will submit the registration and receive materials.
 - As parts of the competition, students are highly-recommended to register for the FSDC membership program "My Career Miles" via <https://www.fsd.org.hk/en/tap/tap-membership/>, which gives you a variety of exclusive opportunities to get up close and personal with industry practitioners, from entry level to top leaders.
4. Once submitted, no modification will be allowed. The decision made by FOAHK is final and cannot be appealed.
5. You consent to FOAHK using and processing all personal information you provide in your application throughout or in connection with the Competition for the purpose of organizing and administering the Competition.
6. All submissions in connection with the Case Competition may be used by FOAHK for judging the Competition and other promotional purposes.
7. Reproduction, redistribution, and transmission of Competition materials in both rounds are prohibited.
8. Any disputes or disagreements are subject to final decision of FOAHK.