

Tax and Estate Planning

稅務策劃及遺產安排



Succession Planning of SME Business 中小企繼任管理與規劃

Objective

Careful succession planning is critical for business owners and SMEs, especially for those looking to hand over responsibility to new management. This course introduces the needs for succession planning and the corresponding strategies. Real life cases will be discussed to help participants understand the planning process and tax considerations.

Level: Intermediate

Contents

- The needs of SME clients
- When should succession planning start?
- Identifying future goals and directions
- Assessing where the business is now
- What is the plan?
- Approaches to succession planning
- Insurance and trust arrangement
- Who should be involved in the succession planning process?
- Managing the transition
- Tax consideration
- Communicating your intentions
- Managing expectations
- Grooming your future stars
- Communicating the change
- Case study

Who Should Attend

Financial planning practitioners, investment advisors, marketing executives and other interested parties

IFPHK CE Credits/SFC CPT/MPFA non-core CPD hours: 5

Follow-up Courses

- Overview of Financial Planning Process M2.1

課程目標

周全的繼任規劃對企業的領導及中小企業皆十分重要，對即將移交業務管理予新管理層者來說，其重要性更甚。本課程將探討中小企繼任管理及規劃的需要與相關的策略，學員將透過個案討論，深入了解繼任規劃的過程及所涉及的稅務安排。

程度：中級

課程內容

- 中小企客戶的需要
- 繼任管理及規劃該何時開始?
- 確立將來的業務目標及發展方向
- 評估業務現況
- 如何制定計劃?
- 繼任規劃的步驟
- 保險及信託的安排
- 誰將參與繼任規劃的過程?

- 過渡的安排
- 稅務的考慮
- 意願傳達
- 管理各方面的期望
- 培育新領導層
- 傳達將有的改變
- 個案研習

適合人士

財務策劃從業員、投資顧問、市場推廣人員及其他有興趣人士

香港財務策劃師學會持續進修學分/證監持續進修時數/強積金局(非核心)持續進修時數：5

進階課程

- 財務策劃流程概述 單元 2.1





Mainland China - Hong Kong Cross Border Investment Tax Considerations

內地市場 — 香港跨境投資稅務安排

Objective

The close tie between Hong Kong and Mainland has produced a group of Hong Kong investors who own assets or investments in China and vice-versa. As a financial planner, understanding these tax effects will assist you in preparing a more complete financial plan for your clients. The course explores the principles, treatments and tips for financial planners when dealing with clients investing in China.

Level : Intermediate

Contents

- Overview of the China tax system
- How financial planners can plan for clients with incomes from China?
- Individual income tax implications for individuals working in China
- Tax obligations and consequences for non-compliance

Who Should Attend

Financial planning practitioners, investment advisors, marketing executives and other interested parties

IFPHK CE Credits/SFC CPT/MPFA non-core CPD hours: 5

課程目標

本課程密切配合香港於中國投資的趨勢。作為一個財務策劃師，更應該了解內地的稅制及其影響，有助更深入為客戶制定一個更完整的財務計劃。

程度：中級

課程內容

- 概述中國稅制
- 如何為有中國收入之客戶提供財務策劃？
- 在中國工作個人所得稅的影響
- 個人稅務責任的規定及違規後果

適合人士

財務策劃從業員、投資顧問、市場推廣人員及其他有興趣人士

香港財務策劃師學會持續進修學分/證監持續進修時數/強積金局(非核心)持續進修時數：5

