



時刻與您緊密聯繫，了解您的所想所求，助您達成宏願

Scope of Services 服務範疇

我們因應客戶之不同財物目標而提供一系列綜合及精確之理財策劃方案。
我們的服務範圍包括：理財策劃、離岸安排、資產管理、退休計畫、風險管理。

We deliver a comprehensive range of sophisticated personal financial planning services to attain our clients' different financial objectives.
Our suits of services includes: financial planning, offshore financial arrangement, wealth management, retirement planning, risk management and etc.

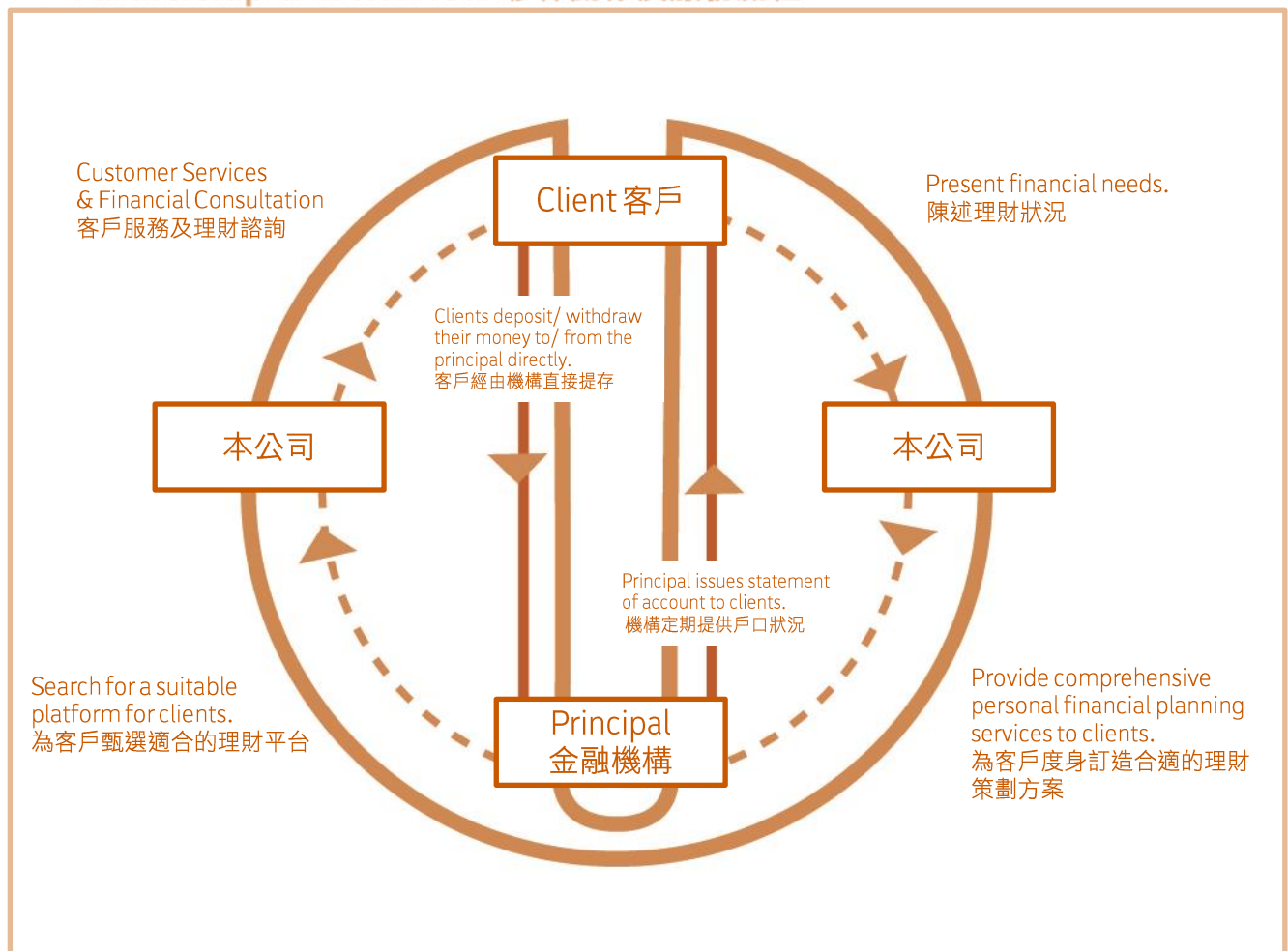
To act independently from all product providers in the best interests of our clients in financial planning.

- ❖ To deliver professional and independent advice on financial planning
- ❖ To continuously review the strategy in the plan as a long-term partner
- ❖ To communicate with produce providers on behalf of our clients

Role of IFA 獨立理財顧問的角色

- ❖ 了解客戶理財狀況及需要，提供專業的理財策劃方案
- ❖ 策劃個人理財方案時以客戶的利益為首，對金融機構持中立態度
- ❖ 作為長期理財策劃伙伴及定期檢討方案
- ❖ 作為客戶及金融機構的溝通橋樑
- ❖ Professional and impartial advice on financial planning
- ❖ Act as the clients' best interest and be independent from all product providers
- ❖ Long term financial planning partner through periodical review and corresponding advice
- ❖ An effective channel/ communication bridge for product providers and clients

Partnership & Work Flow 夥伴關係及服務流程



業務範圍及夥伴

Scope Of Services and Partnership

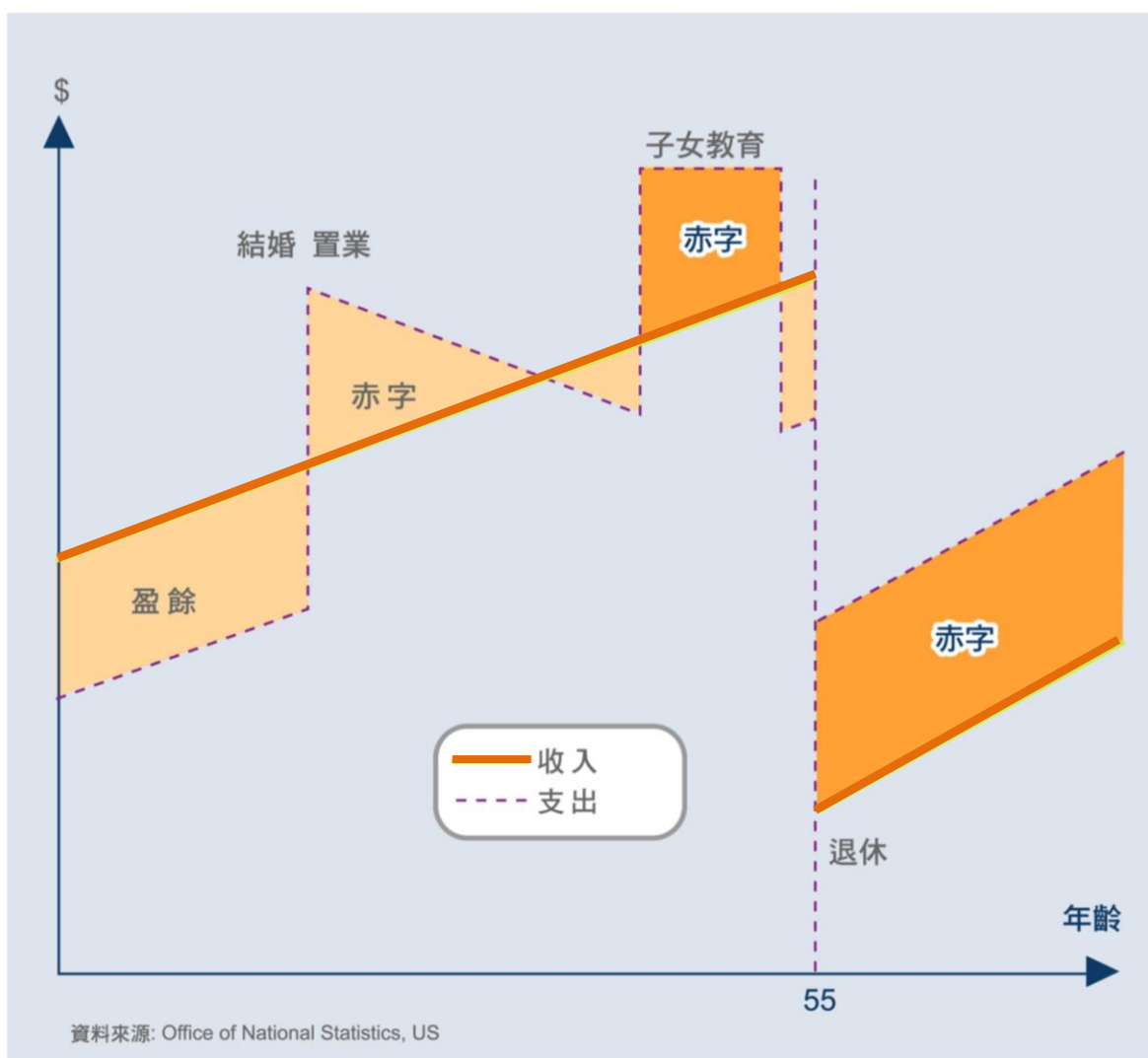
基金/投資銀行



強積金/保險公司



典型人生週期
Typical Life Cycle



—— 收入 Income - - - - 支出 Expenses

Financial Planning is About...

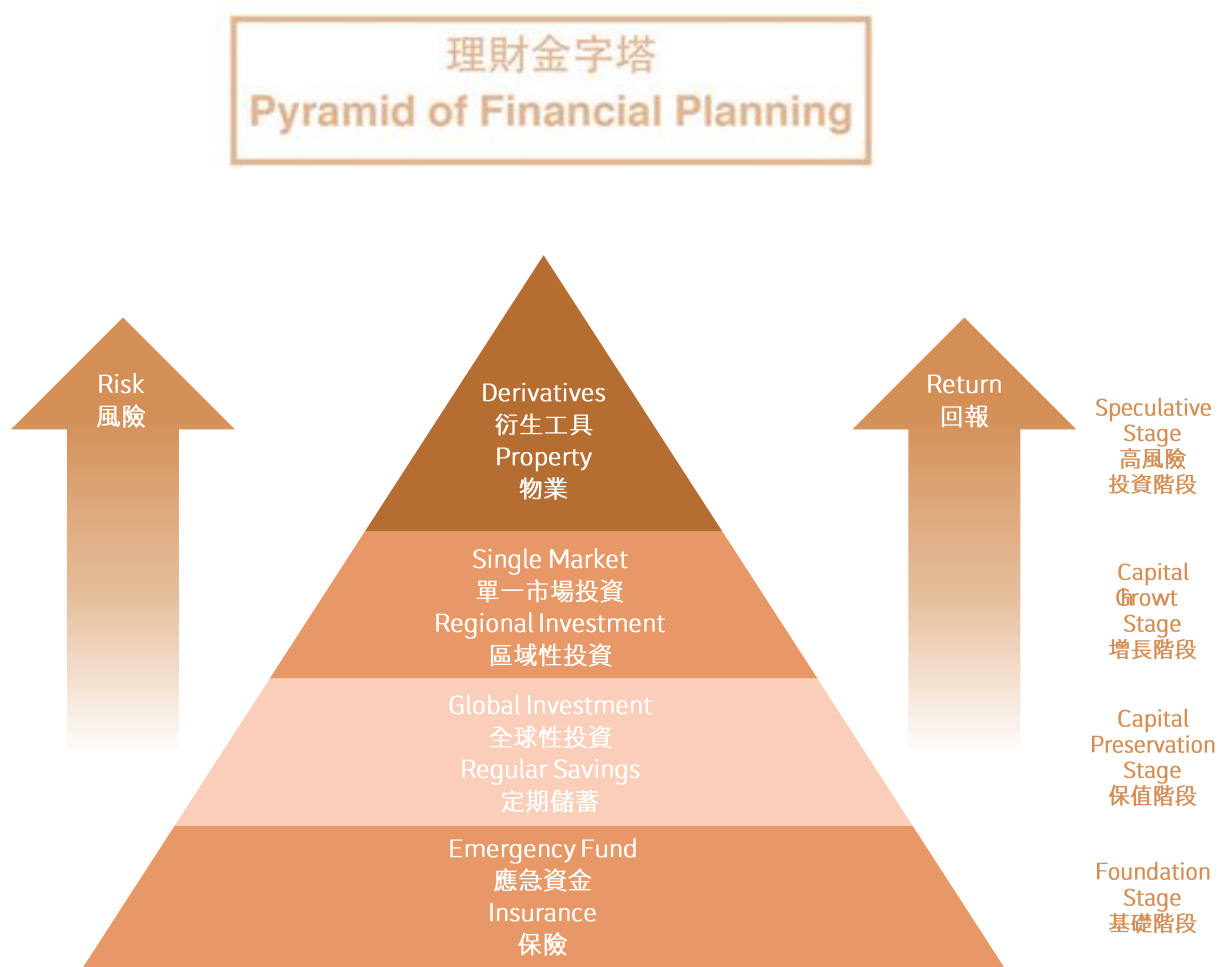
關於理財

有條理地管理個人資產，進行風險評估並藉此獲得最高回報，從而達至個人目標，期望及理想生活。

- ❖ 分析各階段的理財需要
- ❖ 策劃個人理財方案
- ❖ 按時實行所制定之方案
- ❖ 定期檢討方案

Managing your personal assets in wise way with a risk assessment process to achieve the best possible return so that you can attain your personal goals and aspirations toward an ideal life.

- ❖ To analyse one's financial needs for different life stages
- ❖ To formulate a personal financial solution
- ❖ To effectively implement the strategy in the plan
- ❖ To review and improve the plan continuously



優勢與價值

Niche and Value



國際視野

我們的管理隊伍凝聚了金融精英，具豐富的國際金融經驗、高瞻之視野，為客戶提供優秀卓越的投資金融服務。

靈活進取

我們關係網絡覆蓋全球，不時引進嶄新及合適之金融產品，並靈活運用，為尊貴的客戶拓展投資選擇。

專業管理

我們採用現代化之管理模式，決策速度快，市場反應靈活，推崇團隊合作精神，在業務爭取上具備有利條件。