





# Map Your Future

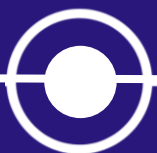
We provide more than just insurance,  
but ideas and solutions

ZUU Digital Financial Services Limited ("ZUU") is  
an insurance broker in Hong Kong licensed and  
regulated by the Hong Kong Insurance Authority.



# Who we are?

You are at the heart of everything we do. Our diverse experts with a competitive range of skills offer a global view with local knowledge, helping you to grow your assets or protect what you already have.



2008

IA Licensed Broker



- General Insurance
- Long Term Business
- MPF

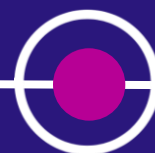


2020

Acquired  
& Renamed as

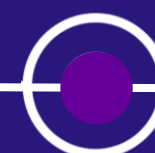


Rebranding  
& Repositioning



2021

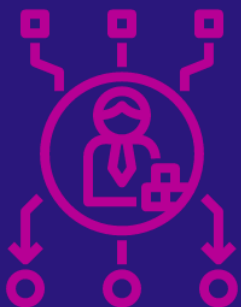
Strategic  
Partnership



2022

Strategic  
Partnership

Private Bank &  
Financial Institutions



### Strategic Partnership with Private Bank & Financial Institutions

- Ample sources of quality HNW clients



### Direct Relationship With Offshore Insurers

- Servicing clients without geographical restrictions



### Comprehensive Product Platform

- 1,000+ world-class risk management and wealth management products



### All-rounded Tailormade Solutions

- From financing, property, healthcare to education and lifestyle



Client  
Base

Digital  
Business  
Services  
Platform

Business  
Partners &  
Distribution  
Channels



Corporate/ HNWIs/ Mass Affluent

- Insurance Planning
- Offshore Solutions
- Wealth Management
- Portfolio Creation



- Corporate Solutions
- Tax Planning
- Life Protection
- Legacy Succession



Offshore  
Insurers



Insurance  
Companies



Financial  
Institutions



Private  
Banks



# Full range of solutions



Insurance  
planning

Providing a wide range of coverage, including

- Medical & Critical Illness
- Accident & Disability
- Savings & Life



Corporate  
solutions

Managing the risk for investors and institutions, including

- Practical & Sustainable plans



Wealth  
management

Maintaining and increasing wealth based on

- Financial Situation
- Goals
- Risk Tolerance



Tax  
planning

- Tax efficient structuring
- Tax compliance such as filing returns
- Advice on charitable giving and philanthropy



# Full range of solutions



Offshore  
solutions

To leverage our global network and support your company with accessing services in our offshore jurisdictions



Portfolio  
creation

Collecting of various assets owned by investors, including

- Growth Portfolio
- Income Portfolio
- Value Portfolio



Life  
protection

Covering the risk of dying and the financial impact



Legacy  
succession

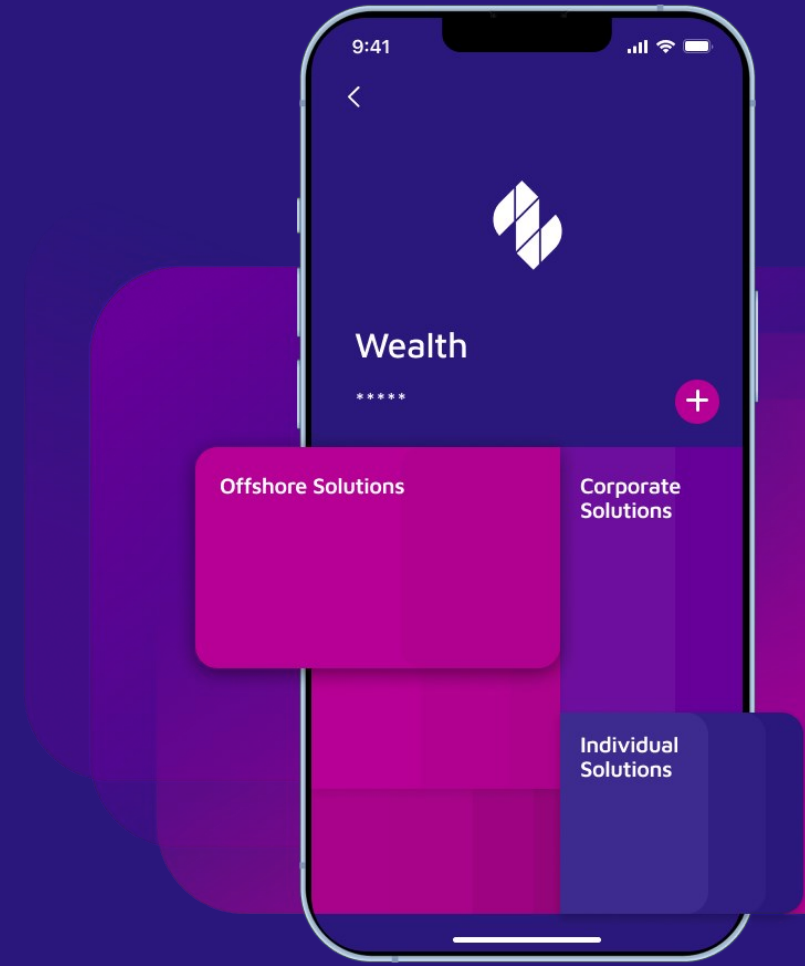
Assisting in unexpected events or for permanent retirements





All Information **With Just A Tap!**

# One-Stop Wealth Management Digital Platform







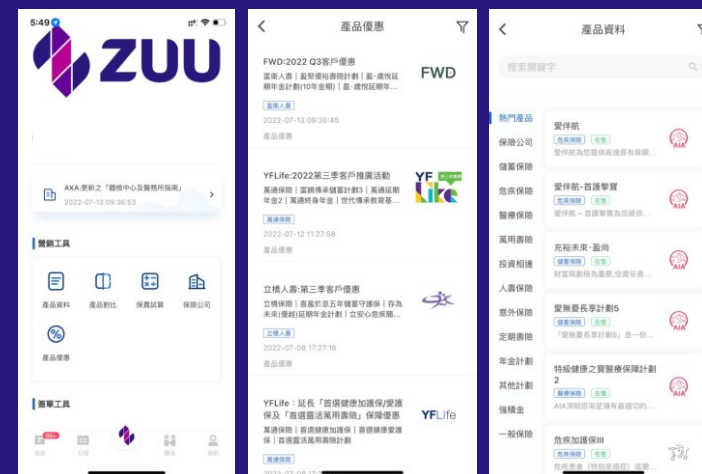
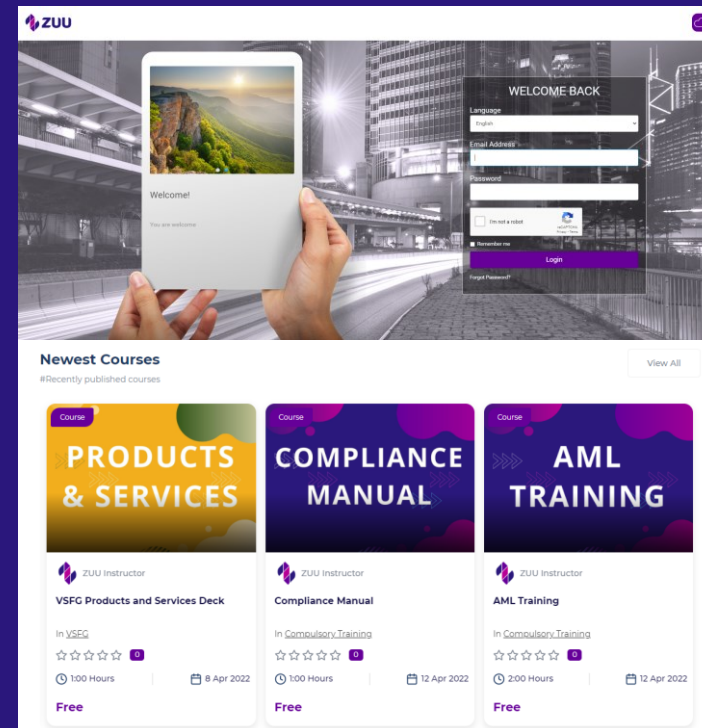
## BWS Platform

An internal communication platform that allows for the best flow of information between the sales team and back office team.



## CRM Application Platform

Providing professional and comprehensive sales plan and financial management tools, with mobile features such as product comparison, proposal generation, appointment booking and policy underwriting.





# Management Team

Industry experts in Fintech, Investment and Risk Management



Mr. Leonard Chan

---

Managing Partner

Wealth Tech Expert





# Mr. Leonard Chan

Managing Partner of ZUU

## Fintech opinion leader

Playing an important role in fintech development in HK and Greater Bay Area

- Chairman, Hong Kong Innovative Technology Development Association
- Vice Chairman, Greater Bay Area 5G Industry Alliance
- Member, Qualifications Framework ICT ITAC
- Member Representative, Chinese Computer Federation





Dr. Kenny Tang

Strategic Investment Advisor

Investment Expert





# Dr. Kenny Tang

Strategic Investment Advisor of ZUU

## Well-known investment practitioner

Always staying ahead of market trends

- Election Committee Member (Financial Services) of HKSAR
- Chairman, The Hong Kong Institute of Financial Analysts and Professional Commentators Ltd
- Hong Kong Chief Analyst, Finance and Securities Institute (FSI)
- Committee Member, Hong Kong Chinese Enterprises Association
- Executive Committee Member, Hong Kong Professionals Association





Mr. Ken Shek

---

Board Advisor

Risk Management Expert





# Mr. Ken Shek

Board Advisor of ZUU

## Veteran in financing and risk management

- Over 20 years of operation and risk management in renowned international banks and asset management cos, including Chase Manhattan Bank, American Express Bank and AMTD (NYSE: HKIB; SGX: HKB)
- Disrupted the mortgage industry in 1999. Successfully fostered collaboration between American Express Bank and Hong Kong Mortgage Corporation Limited ("HKMC")
- Selling over HKD 1.2 billion mortgage loans and implementing mortgage-backed securitization ("MBS") in American Express Bank



聯絡我們 En



HONG KONG MONETARY AUTHORITY  
香港金融管理局

新聞與媒體

智醒消費者

數據、刊物與研究資料

監管資源

主要職能

關於我們

主頁 / 新聞與媒體 / 新聞稿

### 新聞稿

1999年12月20日

## 香港按揭證券有限公司有擔保按揭證券化計劃與美國運通銀行聯合舉行的簽署儀式

香港按揭證券有限公司（按揭證券公司）今日(1999年12月20日)與美國運通銀行（運通銀行）舉行簽署儀式，根據按揭證券公司的有擔保按揭證券化計劃（該計劃）發行6.3億港元按揭證券。

Extensive experiences in financing and risk management



# Full Back Office Support

Finance

Marketing

Human Resources

Risk Management



Sales

Operation

Compliance

Information Technology



# Hand-In-Hand To The NEXT LEVEL







We Create, Unlock & Seize Opportunities  
For You



An **alternative investment platform** bringing individual access to Private & Alternative market which were only available to institutional investors before.

**The First**

HK SFC-approved **virtual asset manager**

**Strategic Partner of ZUU**

HK SFC licensed entity

**Type 1** (dealing in securities)

**Type 4** (advising in securities)

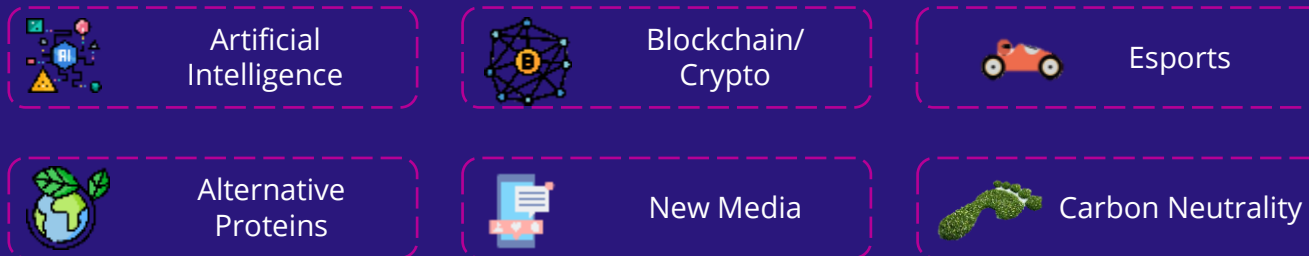
**Type 9** (asset management)

Founded in 2015, VSAL\* is the 1<sup>st</sup> SFC-approved Virtual Asset Manager

Our Vision: The Next Generation Digital Wealth Management

- Creating a digital wealth management platform for both traditional wealth, creators and crypto users
- Guiding traditional wealth to better allocate resources in the metaverse
- Enabling all creators to have better access to financial resources via their on-chain activities
- Enhancing Web3.0 development from aggregating more investors and capital

Our Sectors: Disruptive Technologies



\*Venture Smart Asia Limited ("VSAL") is a member of Venture Smart Financial Holdings Limited ("VSFG")





Extensive client range – from HNWLs to Family Offices and Institutions



HNWLs



Family Offices



Institutions





# Global Extensive Network

Access to  
the Private & Alternative Markets  
same terms as institutional investors

Selected Deals  
Exclusive to





# Be The First-Achiever

5 key areas for you  
to easily enter the private market

Private Equity Fund

Pre-IPO Placement

Private Unicorn Shares

Private Wealth Products

Private Credit

# Themes & ideas to seize opportunities ahead of others







Map Your Future

[zuu.com.hk](http://zuu.com.hk)

To The Next Level

### **Important Notice & Disclaimer**

**ZUU Digital Financial Services Limited (“ZUU”) is an insurance broker in Hong Kong licensed and regulated by the Hong Kong Insurance Authority.**

This document has been prepared by ZUU and unless the context requires otherwise is intended for information purpose only and does not constitute any offer, invitation, solicitation, advice or recommendation to any person to enter into any investment, nor does it constitute any prediction of likely future performance of an investment.

This document, or any part of it, cannot be reproduced, distributed or published in any form by any recipient for any purpose. ZUU and its subsidiaries, affiliates, controlling persons, directors affiliated companies cannot guarantee the fairness, accuracy, completeness or correctness of any information, projections or opinions contained in this document or the basis upon which any such projections or opinions have been based and in the absence of fraud, negligence and wilful default, shall have no liability or responsibility arising out of or in connection with any such information, projections or opinions in this document. Any information herein is based on market conditions and is subject to change without notice.

Products referred to in this document are investment related. Some of them are structured investment products involving derivatives. The investment decision is yours. Do not invest in an investment product unless you fully understand and are willing to assume the risks associated with it. If you are in any doubt about the risks involved in a product, you may clarify with the intermediary or seek independent professional advice.

This document has not been prepared to be suitable for any particular person or class of persons. Investment involves risks. Investment value and return may move up or down, and may become valueless. Past performance is no guide to future performance. Losses may be incurred as a result of an investment decision. Before making any investment decision, you are advised to consider your investment experience, objectives, risk appetite, financial position and other particular circumstances (such as taxation) as you deem necessary. You should also read carefully the terms and conditions and the risk factors contained in the relevant offering documents. If you are in any doubt, you are advised to clarify with the intermediary or seek independent professional advice.