



香港退休計劃協會

The Hong Kong Retirement Schemes Association

Premier Sponsors Package 2024

The Hong Kong Retirement Schemes Association (HKRSA) was established in 1996 to lead and promote sustainable and better retirement outcomes through the following via the HKRSA and RetireHK.com platforms:

Empower

We empower employers, individuals preparing to retire and retirees with retirement planning and tools.

Advocate

We advocate key retirement issues, retirement income and look for value creation.

Share

We share and facilitate retirement information and knowledge.



Address: 1204, 12/F, OfficePlus@Sheung Wan,
93-103 Wing Lok Street,
Sheung Wan, HK

Tel: 2147-0090 Email: info@hkrsa.org.hk Website: www.hkrsa.org.hk

[Facebook](#) / [LinkedIn](#)



香港退休計劃協會

The Hong Kong Retirement Schemes Association

**LETTER TO RETIREMENT INDUSTRY BUSINESS LEADERS:
HKRSA'S PREMIER SPONSOR PACKAGE FOR 2024**

Why should leading industry players like you become a “HKRSA Premier Sponsor?” By doing so, you will be publicly recognized for your affiliation with Hong Kong's only not-for-profit organization dedicated to retirement issues, and at the same time be privy to privileges that will enrich your potential to engage in emerging retirement industry developments.

Formed in 1996, HKRSA has grown in size and leverage and is positioned to provide a strong voice on retirement protection matters in service to our members, employers and other industry stakeholders. We aspire to continue expanding our network and staying at the forefront of thought leadership, through the sponsorship of events, research, policy recommendations, strategic partnerships and alliances, public education and other activities. The launch of our dedicated retirement portal, RetireHK.com, in 2022 demonstrates our commitment to serve our members and the people of Hong Kong.

We invite you to join our continuing journey to promote best practices in retirement protection for the people who live and work in our vibrant global city. As “HKRSA Premier Sponsor”, you will be entitled to exclusive affiliation and benefits as described in this package.

Do not miss out on the opportunity to enjoy special privileges reserved for HKRSA Premier Sponsors in a number of important industry events taking place in 2024.

Cost: HKD 73,500 for one year

We need your support to build a stronger industry platform and we look forward to working together with you in lending a stronger voice to better retirement options for the people of Hong Kong.

Thanking you in advance for your sponsorship,

Sincerely,

Calvin Chiu
Chairman

W H Y H K R S A ?

Reasons to be a Sponsor

Brand building and promotion through
Sponsoring Events

High-profile publicity with
your company logo displayed on
our website, at major HKRSA
sponsored events and in our news
bulletins

Priority Booking for all major events
– with added option of **unlimited
seats at member rates**

Exclusive speaking opportunities
at HKRSA events

P.1

Exclusive Luncheon
with government representatives

Preferential seating at HKRSA
sponsored events – with the
opportunity to meet and connect with
renowned speakers/government
representatives

Unique opportunity
to contribute articles to the
Premier Sponsor Column to share
your thought leadership content with
our members and friends

Enjoy special rates and discounts
at different events of other
organizations when HKRSA as the
supporting organization

Premier Sponsors 2023



健康長久好生活

Allianz 
Global Investors
安聯投資

Amundi
ASSET MANAGEMENT
東方匯理 資產管理

bct
銀聯集團

 **Fidelity** 富達
INTERNATIONAL

 **First Sentier**
Investors
首源投資

FRANKLIN
TEMPLETON®

 **Manulife** Investment Management

 **Mercer**

 **PGIM** FIXED INCOME

T.RowePrice 普徠仕 

 **泰康**
Taikang
保險 资管 医养

泰康資產(香港)
Taikang Asset (HK)



Vision:

- With the rationale to help the to-be-retired and the retired live in the lives of independence, dignity and purpose, RetireHK.com is a dedicated retirement portal targeting the mass public in Hong Kong set-up by The Hong Kong Retirement Schemes Association

Three major retirement focus:



Wealth



Health



LiveWell

Objective:

- Through our programs and website information, the target group can learn to protect their wealth to overcome longevity, improve their mental and physical health and ease the public expenditure for an aging society, and lastly, retired individuals can live in a better shape and good taste with choices

Unique Positioning:

- Attain tax-exemption NGO status under Section 88 of IRD
- Leverage the access to many corporation's employees to participate our activities
- Help individuals to develop social circle and lead a more active live by joining our activities or through our selected information
- Offer suitable and attractive partners' service or product offering to targeted individual member

Seminars / Webinars OF

HKRSA 2023



**23
Feb**

**The Greater Bay Area –
A destination for Hong Kong retirees**

Language: English

With Dr. Au of SFC and HKRSA GBA Taskforce Members

Event Format: In-person Seminar

迎接長壽時代，為退休作更好的準備

Language: Cantonese

With Mr. Patrick CHAN of Taikang Asset Management (HK)

Event Format: Webinar via virtual platform

**28
Feb**



**23
Mar**

**Way forward for Hongkongers with expected monthly
retirement income just one third of current level**

Language: English

With Mr. Elvin THARM of Manulife Investment Management

Event Format: In-person Seminar

**Opportunities and Challenges for Asset Managers after
China's Policy Reversals and Developed Market
Slowdowns**

Webinar Language: English

With Mr. Gerwin BELL of PGIM Fixed Income

Event Format: Webinar via virtual platform

**26
Apr**



**31
May**

應對長壽風險，退休計劃須「復常」

Webinar Language: Cantonese

With Ms. Elaine LAU of AIA International

Event Format: Live Stream Webinar

高通脹增添僱員焦慮 僱主良策助員工解困

Webinar Language: Cantonese

With Ms. Charlotte CHAN of Fidelity International

Event Format: In-person Seminar

**8
Jun**



Seminars / Webinars OF HKRSA 2023



**20
Jul**

Care for physical, mental and financial health at work
Language: English

With Mr. Tony TSUI & Mr. Freddie CHENG of Mercer (HK) Limited
Event format: Live stream Webinar

Essential tips for planning your retirement journey

Language: English

With Mr. Manus CHAN & Dr. Riley MOYNES invited by BCT Group

Event Format: Live Stream Webinar

**29
Aug**



**21
Sep**

China-US: Can we see the end of the Tunnel?

Language: English

With Mr. Albert LEUNG / Mr. Stephen CHOW/

Mr. Christiaan TUNTONO of Allianz Global Investors

Event Format: Live Stream Webinar

ESG投資：尋找退休生活可持續投資的出路

Language: Cantonese

With Mr. Alfred LEE/ Ms. Kristy WONG of Amundi

Event Format: Virtual Webinar

**Oct
27**



**Nov
29**

**Opportunity In Uncertainty:
*Building Resilient Portfolios With Income***

Language: English

With Mr. Alan YOUNG/ Ms. Carol LYE of Franklin Templeton

Event Format: Live Stream Webinar

Investment implication of Generative AI

Language: English

With Mr. Rahul GAHUL/ Ms. Tina SIU of T. Rowe Price

Event Format: Virtual Webinar

**Dec
12**



Happy Moments of HKRSA 2023

**15
Jun**

**Annual General Meeting (AGM) &
27th Annual Dinner**



**14
DEC**

Christmas Luncheon



退休投資多面體 2023

Episode 1 第一集

Upcoming trends beyond compliance in ESG investments

ESG 投資的未來新趨勢

<https://youtu.be/ggzsklViouU>

WELLINGTON
MANAGEMENT®
威靈頓投資管理

Interviewer

陳瑋雯 Mandy CHAN

香港退休計劃協會傳媒活動工作組成員
活動籌組小組委員會副主席

Member of Media Event Taskforce
Vice Chairman of Profile & Events
Sub-committee, HKRSA

Speaker

黃美玲 Elaine WONG

威靈頓管理香港有限公司
香港及澳門機構業務副總裁
Vice President of Hong Kong &
Macau Institutional Business
Wellington Management Hong
Kong Limited



Episode 2 第二集

Virtual assets – the future of investment strategies

虛擬資產 - 投資策略之未來

<https://youtu.be/f-nrvxbiASK>

CSOP ASSET MANAGEMENT | 南方東英

Interviewer

徐明慧 Vivian CHUI

香港退休計劃協會傳媒活動工作組召集人
活動籌組小組委員會成員

Convenor of Media Event Taskforce
Member of Profile & Events
Sub-committee, HKRSA

Speaker

李溢琳 Barbara LEE

南方東英資產管理銷售部副總裁
Vice President Intermediary Sales
CSOP Asset Management



Episode 3 第三集

How to reduce the risk of a retirement investment portfolio

如何減低退休投資組合的風險 <https://youtu.be/kwJs2g17pSE>

泰康 Taikang
保險 資產 医养

泰康資產(香港)
Taikang Asset (HK)

Interviewer

劉嘉時 Ka Shi LAU

香港退休計劃協會行政委員會及
活動籌組小組委員會成員
兩岸四地研討會召集人

Executive Committee and Profile &
Events Sub-committee Member
Convenor of Cross Straits Forum
HKRSA

Speaker

陳浩明 Patrick CHAN

泰康資產管理(香港)有限公司
產品及銷售部副總裁

Vice President
Sales & Marketing Department
Taikang Asset Management
(Hong Kong) Company Limited



Episode 4 第四集

How to manage post-retirement asset

如何管理退休後的資產

<https://youtu.be/srqWDWG2klA>

Invesco

Interviewer

梁碧靄 Penny LEUNG

香港退休計劃協會傳媒活動工作組及
活動籌組小組委員會成員

Member of Media Event Taskforce and
Profile & Events Sub-committee,
HKRSA

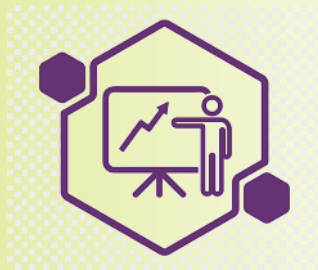
Speaker

容啟寶 Anthony YUNG

景順投資管理有限公司
香港機構業務及退休業務部總監
Head of Hong Kong Institutional &
Pension Business, Invesco



2024 YEAR PLAN



PENSION SEMINARS/WEBINARS/ MEMBER EXCHANGE FORUM

Topics cover the topical pension and retirement issues

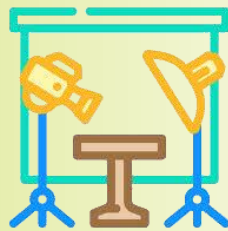
Plan for 10 events including a half-day Seminar



HR Roundtable workgroup

Interactive sharing sessions among HR professionals and HKRSA committees to uncover pension topics of priority. And empower HR to better serve employees' retirement needs

Plan for bi-monthly meetings



MEDIA EVENT

Educational outreach to public via event collaboration with Media to address retirement related matters e.g. Metro Finance



AGM & ANNUAL DINNER

Our Signature Event of the Year!

Tentative: May



CROSS STRAITS PENSION FORUM

To exchange and share best practices on retirement issues across the four regions of Mainland China, Hong Kong, Macau and Taiwan.

Tentative: Oct



CHRISTMAS LUNCHEON

An opportunity to get together and celebrate the festive season!

Tentative: Dec

<https://www.hkrsa.org.hk/en-gb/latest-events>