Essential tips for planning your retirement journey

Retirement is full of new possibilities. A sound retirement plan is essential for the peace of mind we enjoy in our golden years. It all starts from knowing what we want in life and setting goals, so that we can make the most meaningful use of the years ahead.

In this webinar, we invited an industry expert who will share with us tips on how employees shall prepare for retirement with financial and physical wellness. A TEDx speaker based in Toronto will then explain the four phases of retirement most people go through and how they can find fulfilment in a new chapter of life.

Speakers

Mr. Raymond CHAN

Mr. Manus CHAN

Dr. Riley MOYNES

Mr. Alfred LEE

Event Details

Date & Time:	Tuesday, 29 August 2023 | 10:00 am – 11:00 am
Language & Fee:	English | Free
Register:	Register here or by scanning QR code Webcast details will be emailed to participants approximately 24 hours prior to the event via email

Notes :

- This webinar is eligible for 1 hour of non-core CPD/CPT training hours, subject to approval by relevant accreditation bodies. Attendees must log in the Zoom link with the same name and email address registered with the HKRSA.
- Virtual platform will be provided by BCT Group. By registering for this event, you are providing your consent to the HKRSA to pass your personal particulars (including name, title, organisation, and email address) to BCT Group to gain access to virtual facility for you.
- For any enquiries, please contact us at events@hkrsa.org.hk or (852) 21470090.

Event Programme

10:00 – 10:10	**Opening Introduction** **Mr. Raymond CHAN** Investment Director BCT Group
10:10 – 10:45	**Part I – How Employees Prepare for Retirement with Financial and Physical Wellness** **Mr. Manus CHAN** SVP, Consulting, Analytics and Innovations – Great China Lockton Companies (Hong Kong) Limited **Part II – How to Squeeze All The "Juice" Out of the Retirement** **Dr. Riley MOYNES** Author of The Four Phases of Retirement TEDx Speaker
10:45 – 10:55	**Q&A Moderator** **Mr. Alfred LEE** Member of Executive Committee & Chairman of Business Strategy Sub-committee HKRSA
10:55 – 11:00	**Closing Remarks** **Mr. Alfred LEE**

Opening Introduction

Mr. Raymond CHAN
Investment Director
BCT Group

Raymond CHAN is the Head of the Investment Analysis and Product Development Department of BCT Group, leading a team responsible for overseeing the investment performance of external fund managers, fund platform management and pension solution development.

Raymond's investment management experience in Global/Asian equities and fixed income strategies spans more than two decades. After starting his career with LGT Asset Management, Raymond joined Hamon Investment Group, an Asian investment specialist firm in BNY Mellon managing their flagship Asian Market Leaders Fund and Dreyfus Greater China Fund. He augmented his management skills and investment experience in his subsequent role as Investment Director and Head of Greater China markets at Amundi Asset Management (Hong Kong) for eight years, where he managed their flagship Greater China Fund and Asian equity portfolios. He re-joined Hamon in 2011 as Chief Investment Officer focusing on managing portfolios in global multi asset strategy, Asian fixed income & Greater China equities, driving new product launch, and growing institutional, private banks and HNW clientele.

Keynote Speaker for Part I

Mr. Manus CHAN
SVP, Consulting, Analytics and Innovations – Great China
Lockton Companies (Hong Kong) Limited

Manus CHAN devotes his career to employee benefits, covering retirement, health, and wellness in the last 17 years in the US and Asia.

Corporate clients appreciate his expertise on broking services, data analytics, benefit consulting, and utilizing technology and innovation to solve their immediate benefit needs and to strategize their long-term people solutions philosophy.

Prior to joining Lockton, Manus served as the Director of Benefits in an insurance-tech brokerage firm, leading the flexible benefit, retirement, and benefit consulting line of businesses. He was also appointed as Responsible Officer to manage and train brokers on business development, advisories, and technology integration.

Manus holds a Bachelor of Business Administration degree in Actuarial Science from the Georgia State University, and he is a Fellow of the Society of Actuaries and a Chartered Enterprise Risk Analyst.

Keynote Speaker for Part II

Dr. Riley MOYNES
Author of The Four Phases of Retirement
TEDx speaker

Dr. Riley MOYNES has enjoyed a distinguished career spanning four decades in both public and private sectors.

In public education, he served as a Department Head, a Superintendent and a Director of Education. He also authored several textbooks including a History of Russia, and a World Religions text.

In the private sector, he was a Founding Partner of a major Canadian Wealth Management Firm, financial advisor, author of a book entitled *The Money Coach* which enjoyed sales of over 200,000 copies, and co-author of several editions of *Top Funds.*

Since stepping back from day-to-day involvement in financial services, Dr. Moynes researches and writes reader-friendly publications on topics of general interest, and presents Workshops across the country based on those publications.

One of his most recent books, *The Four Phases of Retirement,* became a national best-seller within 12 months of publication, was the basis of his TEDx Talk (which has received over **3.4 million views**) and his presentation today.

Moderator & Closing Remarks

Mr. Alfred LEE
Member of Executive Committee &
Chairman of Business Strategy Sub-committee
HKRSA

Alfred LEE is the Managing Director and Head of Institutional Business, North Asia ex-China of Amundi Hong Kong.

He is responsible for the Institutional Business development in Korea, Taiwan, Hong Kong across all the investment strategies.

Alfred joined Amundi Hong Kong in 2018 as Director, Head of Institutional Business, Hong Kong & Macau. Before joining Amundi, Alfred was the Head of Institutional Business Development for PineBridge in Hong Kong, Macau and Philippines. He started his career at BlackRock in 2009 as an analyst in the institutional client service team to cover the Asia ex-Japan region before being responsible for the business development in Hong Kong, Macau and Philippines.

Alfred graduated from the University of Hong Kong, with honors, in Economics and Finance. Alfred is also a Chartered Financial Risk Manager.