HKRSA 30th Anniversary Symposium

30 Years of Shaping Tomorrow

9 June 2026

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SECURITIES AND FUTURES COMMISSION 證券及期貨事務監察委員會

Rundown

	Agenda	Speakers
1:30pm	Registration	
2:00pm	Welcome Remarks	**Ms Janet Li** Chairman The Hong Kong Retirement Schemes Association
2:10pm	Keynote Address	**Mr Joseph H. L. Chan, JP** Under Secretary for Financial Services and the Treasury The Government of the Hong Kong Special Administrative Region Financial Services and the Treasury Bureau
	Part I - Pension Development and International Practices	
2:25pm	Presentation	**Ms Mary Delahunty** Chief Executive Officer The Association of Superannuation Funds of Australia
2:40pm	Presentation	**Mr Elvin Tharm** Head of Emerging Market Asia Retirement Manulife Provident Funds Trust Company Limited
2:55pm	Panel	***Moderator:*** **Mr Calvin Chiu** Immediate Past Chairman The Hong Kong Retirement Schemes Association ***Panelists:*** **Mr Chris Mansi** Chief Investment Officer, Europe & International Willis Towers Watson **Mr James Koval** Chief Policy & Advocacy Officer The Association of Superannuation Funds of Australia
3:25pm	Tea Break	
3:45pm	Special Address	**Mr Cheng Yan-chee** Managing Director Mandatory Provident Fund Schemes Authority
	Part II - HKRSA 30th Anniversary Research: Empowering Workforce to Strengthen Retirement Protection	
4:00pm	Panel	***Moderator:*** **Mr William Chow** HKRSA 30th Anniversary Research Lead ***Panelists:*** **Dr Rocky Tung** Executive Director Board Member Financial Services Development Council **Ms Lydia Chan** Head of Retirement Benefits, People & Culture Jardine Matheson Limited **Ms Glynis Shea** Director of Total Rewards & Governance, Group Human Resources CLP Group

Rundown

	Part III - Transformation for the Next Decade	
4:35pm	Presentation (Conducted in Mandarin)	**Mr Dick Wan** Former Vice Chairman Taikang Life Insurance Co., Ltd.
4:50pm	Panel	***Moderator:*** **Mr Alan Young** Vice Chairman The Hong Kong Retirement Schemes Association ***Panelists:*** **Ms Rupeng Chen** Head of Wealth (North Asia) and Head of Retirement (Asia) Mercer **Mr Dick Wan** Former Vice Chairman Taikang Life Insurance Co., Ltd.
5:20pm	Closing Remarks	**Mr Alan Young** Vice Chairman The Hong Kong Retirement Schemes Association
5:30pm	Event End	

Emcee: **Ms Cynthia Chung**
Legal Advisor
The Hong Kong Retirement Schemes Association

Speakers

Janet LI
Chairman
The Hong Kong Retirement Schemes Association

Janet Li, CFA, MAoF, is the Chief Executive Officer of BEA Union Investment Management Ltd. She is responsible for leading the business and driving it's strategic growth.

Janet has more than 20 years of experience in the financial industry. Prior to joining BEA Union, she was the Wealth Business Leader for Asia and a Partner at Mercer where she led the Retirement and Investment business of the firm in the region. Throughout her investment consulting career, she worked closely with institutional clients and platforms on their portfolios and across diverse types of asset classes ranging from public to private markets investments.

Janet makes active contribution to the investment and pension industry by bringing thought leadership and via her pro bono work in the community. She is currently serving as the Chairman of the Executive Committee of the Hong Kong Retirement Schemes Association. She is also serving as Member of the Mandatory Provident Fund Schemes Advisory Committee and Member of the Human Capital Committee of the Financial Services Development Council. She is an Adjunct Associate Professor of The Faculty of Business and Economics at The University of Hong Kong.

Joseph H.L. Chan, JP
Under Secretary for Financial Services and the Treasury
The Government of Hong Kong SAR

Mr Chan was appointed the Under Secretary for Financial Services and the Treasury on 16 August 2017.

Mr Chan has many years of senior executive experience in the banking industry. He was a Managing Director in the Global Markets Division of Credit Agricole Corporate & Investment Bank, and was a Managing Director in Financial Markets of Standard Chartered Bank.

Prior to joining the Government, Mr Chan held multiple roles in a number of public and professional bodies, including Vice President of the Hong Kong Society of Financial Analysts, Director of Hong Kong Securities & Investment Institute, Advisor of the Chinese Gold & Silver Exchange Society, as well as a General Committee member of the Hong Kong General Chamber of Commerce. Mr Chan was also a member of the Central & Western District Council.

Mr Chan holds a Bachelor of Arts in Economics (Hon) and Psychology from the University of Michigan, USA. He is also a Chartered Financial Analyst.

Speakers

Mary DELAHUNTY
Chief Executive Officer
The Association of Superannuation Funds of Australia

Mary Delahunty is the Chief Executive Officer of the Association of Superannuation Funds of Australia Limited (ASFA).

ASFA is the peak policy, research and advocacy body for Australia's superannuation industry. It is a not-for-profit, sector-neutral, and non-party political, national organisation. ASFA's mission is to continuously improve the superannuation system, so all Australians can enjoy a dignified retirement.

Mary joined ASFA in 2024 after founding Seven Advisory, a specialist ESG and impact advisory service to institutional investors developing their social license to deliver long-term value. Prior to that, Mary was Head of Impact at HESTA where she played a key role in shaping strategic policies and responsible investment practices to advance member outcomes in the superannuation system. She was also previously an executive with Link Market Services.

Mary is a member of the Pensions & Investment World Pension Summit International Advisory Board and serves on the board of the Gateway Network Governance Body (GNGB), alongside board roles across the RegTech and education sectors. She was also a 2015 Churchill Fellow, awarded for international research into gender equity in retirement outcomes.

Mary studied Arts at the University of Melbourne, and later completed a Graduate Diploma of Financial Planning and then a Masters of Applied Finance.

Elvin Tharm
Head of Emerging Market Asia Retirement
Manulife Provident Funds Trust Company Limited

Elvin Tharm is Head of Emerging Market Asia Retirement and Board of Director at Manulife Provident Funds Trust Company Limited. He is responsible for strategic visions and propositions for the retirement business across the Asia markets as well as serving as the Head of Retirement for retirement markets in Indonesia, Malaysia, Philippines and China. Elvin also serves as a non-executive Board of Director for Manulife Investment Management and Trust Corporation in the Philippines.

Prior to joining Manulife, Elvin was the Head of Business Development and Client Relationship for Mercer Hong Kong's Wealth business. He was responsible for bringing together pensions and investment solutions for institutional investors and wealth management intermediaries in Hong Kong, Singapore, Macau and Taiwan.

Before that, Elvin held several senior positions with Principal Financial Group in Hong Kong and prior to that, he was an actuarial consultant with Willis Towers Watson in Los Angeles, California and subsequently in China covering Shanghai, Beijing, Shenzhen and Guangzhou.

Elvin is a Fellow of the Society of Actuaries and the Actuarial Society of Hong Kong. He also serves as the Chair of the Business and Strategy Sub-committee and a Taskforce member of the Cross Straits Pension Forum of the Hong Kong Retirement Schemes Association (HKRSA).

Speakers

Calvin Chiu
Immediate Past Chairman
The Hong Kong Retirement Schemes Association

Calvin Chiu is CEO of Manulife Investment Management Hong Kong. He oversees the entire MIMHK business and is responsible for establishing Manulife Investment Management Hong Kong's strategy and driving business development. This includes directing the execution of these strategies and overseeing operational activities to achieve the company's goals.

Prior to his current role at Manulife, Calvin was the Head of Asia Retirement overseeing the pension business of Hong Kong and Indonesia. He was also responsible for retirement business development and expansion strategy across the region, as well as providing retirement related subject matter expert support to each market in Asia.

Calvin joined Manulife in September of 2010 as Vice President, Global Pensions and Benefits, and subsequently took on responsibility for executive compensation and global mobility programs.

Prior to joining Manulife, Calvin was the Senior Director of Global Pensions at Canadian Imperial Bank of Commerce from 2007 to 2010. From 1999 to 2007, Calvin was a consultant with Towers Watson in the US retirement business and subsequently the international consulting group.

Calvin holds a Bachelor of Math in Actuarial Sciences from the University of Waterloo. He is a Fellow of the Society of Actuaries.

Chris Mansi
Chief Investment Officer, Europe & International
Willis Towers Watson

Chris Mansi is WTW's Chief Investment Officer for the Europe & International region, and a member of the region's business leadership team. In this role, Chris is responsible for ensuring that the solutions and services offered to clients in the region contain WTW's best investment thinking relevant to their needs, and, along with other senior WTW investors globally, for driving ongoing innovation and evolution in that investment thinking. Chris also chairs WTW's Global Portfolio Management Group, which is responsible for the development and communication of WTW's global views on portfolio construction, evolving opportunities and risks and dynamic positioning.

Chris's prior roles at WTW include leading its delegated portfolio management team globally for 10 years, which today stands at c. $180bn assets under management, where he was responsible for the development and execution of WTW's investment process for managing discretionary portfolios for its clients. Chris has also worked directly with a number of large clients to design and then manage a discretionary portfolio for them.

Chris graduated from Oxford University in 1994 with an MA degree in Mathematics and is a Fellow of the Institute of Actuaries. He joined WTW in 1999.

Speakers

James Koval
Chief Policy & Advocacy Officer
The Association of Superannuation Funds of Australia

ASFA is the peak policy, research, and advocacy body for Australia's superannuation sector. As the Chief Policy & Advocacy Officer, James Koval oversees the development of sector policy positions, best-practice guidance the development of thought leading research papers, and undertaking external engagement to advance ASFA's advocacy priorities.

Prior to joining ASFA, James was a senior public policy and strategic advising specialist, working for over a decade across government and public policy roles, including advising government leaders, treasurers, and senior cabinet ministers across a range of portfolio areas.

James holds his bachelor's degree from the Australian National University and a Master of Public Policy from the University of Sydney.

Cheng Yan-chee
Managing Director
Mandatory Provident Fund Schemes Authority

Mr Cheng joined the Mandatory Provident Fund Schemes Authority (MPFA) in 2013 as Chief Corporate Affairs Officer and Executive Director. He was appointed as Managing Director of the MPFA in 2022.

Before joining the MPFA, Mr Cheng served as an Administrative Officer up to Deputy Secretary in various government bureaux and departments responsible for home affairs, financial services, trade and industry, education, information technology services, housing and social welfare.

Speakers

William Chow
HKRSA 30th Anniversary Research Lead

William Chow currently leads the Hong Kong and Macau retirement consulting business at WTW. He has 18 years of consulting experience for many local and multinational clients. His consulting focus is actuarial valuations, cost analysis, scheme design and market benchmarking, selection and review of service providers, and employee communications.

William is currently the actuary to many retirement schemes, responsible for actuarial certification and financial reporting for retirement schemes and Long Service Payment obligations.

William is actively involved in the Hong Kong retirement schemes industry. He is currently a member of the Pensions & Employee Benefits Committee in the Actuarial Society of Hong Kong and a member of the Employee Benefits Working Group in the Hong Kong Institute of Certified Public Accountants. Besides, he works regularly with different pension trustees, administrators, pension legal advisors and pension auditors.

William is a Fellow of the Society of Actuaries, Fellow of the Actuarial Society of Hong Kong, Chartered Financial Analyst, and has a Bachelor of Science degree from the Chinese University of Hong Kong majoring in Quantitative Finance.

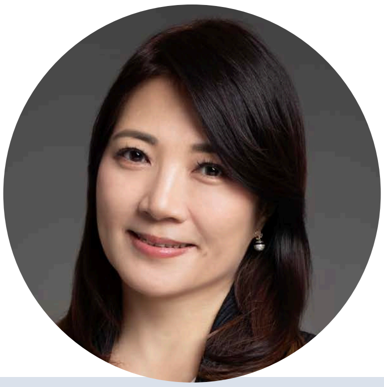
Rocky Tung
Executive Director
Board Member
Financial Services Development Council

Dr Rocky Tung is the Executive Director for the Financial Services Development Council (FSDC). He provides strategic leadership to advance policy research, foster industry collaboration, and drive initiatives that enhance the development and international competitiveness of Hong Kong's financial services sector.

Before his current appointment, Dr Tung served as Director and Head of Policy Research at the FSDC between 2019 and 2026, leading its research effort to formulate proposals for the Hong Kong Special Administrative Region Government and financial regulators. Prior to joining the FSDC, he was the Director of Capital Markets Policy at the CFA Institute, covering research on capital market structures in the Asia-Pacific region. Before that, he was the Senior Economist for the Hong Kong General Chamber of Commerce, where he oversaw its macroeconomic research, as well as labour- and international trade-related policy research functions. He also served as an economist and research analyst for banks, a trade credit insurer, and a Hong Kong-based think tank.

Dr Tung holds a doctoral degree in organisational leadership from Northeastern University in Boston and is a Fellow of CPA Australia. He received master's and bachelor's degrees in Economics from the University of Hong Kong and the University of Wisconsin–Madison, respectively.

Speakers



Lydia Chan
Head of Retirement Benefits, People & Culture
Jardine Matheson Limited

Lydia Chan is the Head of Retirement Benefits at Jardine Matheson Limited, based in Hong Kong, with over 20 years of experience in human resources, including more than 10 years specialising in retirement benefits. She oversees the design, governance and administration of ORSO and MPF schemes across the Jardines Group and works closely with trustees, advisers and senior management on investment, regulatory and operational matters.

Glynis Shea
Director of Total Rewards & Governance Group Human Resources
CLP Group

Glynis Shea is Director – Total Rewards & Governance in Group Human Resources at CLP Group. She leads the Group's total rewards and remuneration governance agenda, covering executive remuneration, incentive design, benefits governance, and related regulatory matters, and works closely with senior management and board committees to align reward outcomes with business performance and long term sustainability.

Glynis holds a BSc (Hons) in Business Management from King's College London, UK, and a Master's degree in Human Resources Management from Macquarie University, Australia. Prior to joining CLP Holdings, she held human resources leadership roles within the pharmaceutical sector, as well as in HR consultancy, bringing both in house and advisory perspectives across industries.

Speakers

Dick Wan
Former Vice Chairman
Taikang Life Insurance Co., Ltd

Dick Wan (Kee Man Wan 尹奇敏), FSA, FCAA, FCIA, FLMI, has more than 40 years of experience in the insurance industry and has held various senior management positions in different insurance companies in Hong Kong, Canada, Taiwan, Shanghai, Beijing, etc. In August 2001, he was invited to join Taikang Life Insurance, and successively served as Chief Actuary, Chief Financial Officer, and Chief Marketing Officer of Taikang Life Insurance. In 2016, he served as Executive Vice President and Chief Insurance Officer of Taikang Insurance Group, Vice Chairman of Taikang Life Insurance, and was fully responsible for the company's insurance business. Since July 2019, Mr. Wan has been fully in charge of the preparation work for the proposed Hong Kong subsidiary, the "Taikang (Hong Kong) Preparatory Team" of Taikang Life Insurance.

Alan Young
Vice Chairman
The Hong Kong Retirement Schemes Association

Alan Young serves as the Vice Chairman and a member of the Profile & Events Sub-committee at the Hong Kong Retirement Schemes Association. In this role, he collaborates with industry experts, policymakers, and key stakeholders to promote retirement awareness and improve retirement outcomes across the industry.

With over 25 years of experience in the financial services industry, Mr. Young has held senior roles at several prominent financial institutions. These include Co-Head of Hong Kong at Franklin Templeton, Head of Institutional Sales at Schroders Investment Management, Head of Sales for North Asia at State Street Global Advisors, Director at Barclays Global Investors, and Executive Director at Goldman Sachs Asset Management. Earlier in his career, he worked in private wealth management at Merrill Lynch and as a defined contribution (DC) pension specialist at HSBC, a role he began in 1999.

Mr. Young holds a bachelor's degree in Finance and Marketing from Concordia University in Montreal, Canada.

Speakers

Rupeng Chen
Head of Wealth (North Asia) and Head of Retirement (Asia)
Mercer

Rupeng Chen is the Head of Wealth (North Asia) and Head of Retirement (Asia), and a Partner at Mercer. Based in Hong Kong, she is responsible for leading all aspects of Mercer's wealth (North Asia) and retirement (Asia ex Japan) practice.

Rupeng has 20+ years of experience in asset management, investment and actuarial consulting, working with institutional clients, including some of the largest sovereigns, government and corporate pension funds, insurers, and wealth institutions across the APAC markets.

Her expertise spans the areas of asset management (e.g. strategy design, portfolio construction, risk/return optimization, implementation), investment solutions, sustainable investing and pension consulting. Prior to joining Mercer, Rupeng held senior investment positions at Robeco (Hong Kong) and Schroders (Australia) with APAC coverage, as well as various retirement and actuarial consulting roles earlier in her career.

Rupeng graduated with double degrees in Bachelor of Commerce (Actuarial Studies) and Bachelor of Laws from Macquarie University Australia. She is a CFA charterholder and an actuary.

Cynthia Chung
Legal Advisor
The Hong Kong Retirement Schemes Association

Cynthia Chung is a partner of and the Head of Human Resources and Pension Group at Deacons. She has over 25 years of experience in all kinds of advisory work related to employment and labour and on retirement schemes and provident funds.

She advises clients on both contentious and non-contentious labour matters and the preparation of trust deeds and related documents for retirement and pension schemes. Her clients include employers who are multi-national companies and statutory bodies and MPF/ORSO service providers. She is the Executive Committee Member and Honorary Legal Adviser of The Hong Kong Retirement Schemes Association, Member of the Retirement Scheme sub-committee of the Law Society and the Guidelines Committee of the Mandatory Provident Fund Schemes Authority.

She is recognised as a Band 1 Lawyer in Employment (China) in Chambers Asia-Pacific, "Hall of Fame" for Labour and Employment in Legal 500 Asia Pacific and a Thought Leader in Labour & Employment and Pensions & Benefits in Hong Kong by the Who's Who Legal.

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