
## Manage your financial wellbeing for your present and future

Amidst the challenges and uncertainties in our ever-changing world, we can get ahead in our lives by focusing on and taking care of what we can control. Understanding the importance of being financially well, checking up on how financially fit you are and applying guidelines to your financial planning may help you become financially well under various circumstances and in all stages of your life.

**What is Financial Wellness?**
We believe financial wellness is holistic and multi-layered with objective and subjective inputs across four key domains: Budgeting, Debt, Savings and Protection.

Please join the Fidelity Hong Kong Workplace Investing team as they look more closely into the four domains that make up one's overall financial wellness and introduce tools to help you understand more about your own financial wellness.

## Event Details

Please join **Mr. Louis LI** of Fidelity International sharing on a webinar

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| Date & Time: | Thursday, 12 January 2023\| 11:00 am – 12:00 noon |
| Language & Fee: | English \| Free |
| Register: | Register here or by scanning QR code<br>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 Fidelity. 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 Fidelity to gain access to Zoom facility for you.
- For any enquiries, please contact us at events@hkrsa.org.hk or (852) 21470090.

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## Event Programme

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| **11:00 – 11:10** | **Opening Presentation**<br>**Ms. Charlotte CHAN CFA CAIA**<br>Head of Distribution<br>Hong Kong Workplace and Personal Investing<br>Fidelity International |
| **11:10 – 11:45** | **Keynote Speaker**<br>**Mr. Louis LI CFA**<br>Associate Director<br>Hong Kong WI Sales<br>Fidelity International |
| **11:45 – 11:55** | **Q&A**<br>**Ms. Doris HO**<br>Immediate Past Chairman of Executive Committee<br>Member of Member Communication Sub-committee<br>HKRSA |
| **11:55 – 12:00** | **Closing Remarks**<br>**Ms. Doris HO** |

## Opening Presentation

**Ms. Charlotte CHAN CFA CAIA**
Head of Distribution
Hong Kong Workplace and Personal Investing
Fidelity International

Charlotte Chan is Head of Distribution for the Hong Kong Workplace and Personal Investing business, where she oversees various distribution channels including digital, direct sales and relationship management teams, and leads product and platform innovation.

Charlotte brings over 20 years of experience in investment advice, focusing on managed solutions for both institutional and individual clients for their pensions and private wealth. She has held various roles at Fidelity, including Portfolio Strategist for North Asia intermediary business Director for Hong Kong defined contribution business where she focused on business development and client relationships, and investment directing for the Hong Kong institutional business.

Previously, she was Managing Director, Asset Allocation at Manulife Asset Management, where she was responsible for investment communication for multi-asset strategies in Asia. Earlier in her career, she worked in Citigroup, GAM and Merrill Lynch in investment analysis and in an advisory capacity for private clients.

Charlotte holds a Master of Science in Statistics from Stanford University and a Bachelor of Science in Economics (Honors) and Statistics from the University of Michigan, Ann Arbor, as well as Chartered Financial Analyst and Chartered Alternative Investment Analyst certifications.

## Keynote Speaker

**Mr. Louis LI CFA**
Associate Director
Hong Kong WI Sales
Fidelity International

Louis joined Fidelity International in 2011, and is responsible for business development initiatives covering Workplace Investing in Hong Kong. In his capacity, Louis works closely with consultants, brokers and employers in helping them to better understand Fidelity's MPF/ORSO propositions and to ultimately appoint Fidelity as their retirement partner.

Louis holds a Bachelor of Commerce (BComm) degree from the University of Toronto and is a CFA Charterholder.

## Moderator & Closing Remarks

**Ms. Doris HO**
Immediate Past Chairman of Executive Committee
Member of Member Communication Sub-committee
HKRSA

Doris is the Immediate Past Chairman of the Executive Committee of the Hong Kong Retirement Schemes Association (HKRSA) and also a member of the Member Communication Sub-committee.

Doris is the Executive Director of the Hospital Authority Provident Fund Scheme (HAPFS). She has oversight and management responsibility for all investment and operational activities of the Scheme. Before taking up the current role, she was the Director of Investment managing the investments of the Scheme including strategic asset allocation, manager configuration, manager monitoring and selection, risk management, etc.

Prior to joining the HAPFS in 2007, Doris was an associate director with Mercer, where she advised clients in a wide range of investment services including investment strategy, policy and structure, manager search, etc. She also covered manager research for the Asia ex-Japan region. Doris has more than 20 years of experience in the investment and retirement industry.