

Family Trusts and Family Harmony

Presenter:

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Course Details:

Date: 18 October 2022, Tuesday	Language: English	CPD HK Law Points: 2.0 <i>(face to face only)</i>
Time: 10:00 am – 12:10 pm	Level: Standard ³	CPD BC Law Credits: 2.0
Venue: Live via Zoom	Fee: HK\$1,600 <i>(Regular Fee)</i> HK\$1,440 <i>(C&S members via online)</i>	CPT Hours¹: 2.0
		CFA CE Credits²: 2.0
		CFA SER Credits²: 1.0

Asian families value harmonious family relationships. And they often think that setting up a family trust will preserve family harmony. However, whether there is harmony or not is a question of the culture of the family. When a family sets up a trust structure, this might be helpful in that it can provide for clear roles & authorities. However, there is a saying that “culture will always eat structure for breakfast”. Creating a trust structure is not sufficient by itself to impact on the culture of the family in a positive way.

Therefore, what are some practices that families can put into place, with the help of their trustees and advisers, to create a family trust structure that is aligned with their culture and that can be used to invest in supporting a more positive family culture?

Two useful references which will be relied on in the webinar are: (i) Family Wealth Keeping It In The Family by James E. Hughes Junior and (ii) Family Trusts, A Guide For Beneficiaries, Trustees, Trust Protectors And Trust Creators by Hartley Goldstone, James Hughes and Keith Whitaker.

Course Highlights:

- A checklist of principles and practices to apply to design new trust structures as well as to existing structures to invest in family harmony and family human capital
- Making family harmony an enacted family value, not just an espoused value
- Family Trusts vs Family Systems
- The importance of working with both culture and structure
- Developing collaborative skills within the family
- Making family learning and development an ongoing practice
- Understanding conflict in the context of a family enterprise
- Building a collaborative multi-disciplinary team of advisors

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Note 3 – Standard: for those who have basic knowledge of this topic.

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