

To: Finance Editor

## Newly Elected President, Mr. Richard Mak and Other Important Appointments

<20 Nov 2020 – Hong Kong> The Board of Directors ("Board") of CFA Society Hong Kong ("Society") is pleased to announce that Mr. Richard Mak, CFA, was elected as the president of the Society at the Board meeting being held on 14 October 2020. Furthermore, Mr. William Leung, CFA and Mr. Adam Wong, CFA were co-opted as board members by the Board. The Society also welcomes Ms. Joanna Kwok as the newly appointed managing director.

Since re-joining the Board in 2017, Richard has been actively involved in various core endeavours, including the CFA Society Hong Kong Rebrand, advocacy initiatives and co-chairing the Continuing Education Sub-group. Richard served as the president of the Society from 2002 to 2005. Moreover, the Board also welcomes William and Adam as new board members. They both have a wealth of experience with the Society and have contributed to numerous major initiatives, including the Best Research Report Competition (BRRC) and the Mentorship Programme. In addition, the Board is thrilled to confirm the appointment of Joanna as managing director. Being a true professional in the association and education space, Joanna also possesses wealth of experience from CFA Institute.

The Board also takes this opportunity to thank the outgoing president, Mr. Franki Chung, CFA, for his dedication and contributions to the Society.

Mr. Richard Mak is a true financial veteran. He is currently the Head of Product & Business Management - Asia at Pictet Wealth Management. He joined Pictet in 2011 to lead the Asia Advisory Team to provide investment advice to high-net-worth investors in Asia. Prior to joining Pictet, he was the head of Advisory - Asia at BNP Paribas Wealth Management. Richard has over 30 years of experience in the financial industry with 17 years in equity investments and has been advising private clients on global investments since 2003. Between 2004 and 2008, he served as the President Council Representative of Asia Pacific Region at CFA Institute.

Mr. William Leung is a veteran in the fund management industry, and a partner and member of the Investment Committee at Overlook Investments. He joined Baring Asset Management in 2003 as an investment analyst and then HSBC Asset Management in 2004. In 2005, he joined Acru Asset Management and has co-managed the Acru China Absolute Return Fund, a value-driven Greater China hedge fund. In 2015, he established Fundatech Capital. William joined Overlook Investments in 2017. Apart from BRRC, he is also a member of CFA Institute Research Challenge Hong Kong Local Final Sub-group and Value Investing Interest Group.

Mr. Adam Wong is a passionate triathlete. He is currently the executive director in one of the global banks. Before that, he was a banker working for ultra-high-net-worth clients in Hong Kong and South China, and was the co-chair of the Asia Advisory Council at JP Morgan. Adam co-founded the Society's Running Club and Mentorship Programme as well. He also co-chairs the Member Services Committee - Networking Events Sub-group and serves as a member of Continuing Education Sub-group.



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Ms. Joanna Kwok has extensive experience in marketing communications and executive development. She was formerly director of Executive Development Centre, Hang Seng University of Hong Kong (HSUHK), where she founded the Centre in 2015 and was responsible for the development of executive training programmes, conference organisation and providing consultancy services for business corporations and government units. She is also a seasoned professional in the marketing, corporate communications, management, training and education fields with more than 30 years of relevant experiences across a wide range of industries. Prior to HSUHK, she had worked for CFA Institute Asia-Pacific office for 13 years, managing and developing the office and later providing strategic consultancy services to more than twenty CFA Institute member societies and groups within the Asia-Pacific region.

"I am excited to have strong new blood joining the Board and the Society's operation arm. We believe CFA Society Hong Kong will grow from strength to strength to achieve our goals of raising the professional and ethical standard of financial analysts and investment practitioners in Hong Kong via our steadfast advocacy efforts" said Mr. Richard Mak, president of the Society.

### About CFA Society Hong Kong

CFA Society Hong Kong (also known as The Hong Kong Society of Financial Analysts) is a non-profit organisation founded in 1992 by a group of CFA charterholders in Hong Kong. The Society currently has over 6,800 members (as of 30 Jun 2020) and is one of the largest member societies of CFA Institute with more than 160,000 members among 159 local member societies across 164 global markets. The Society is mostly run by member volunteers with the support of a team of professional staff.

The Society shares the mission of CFA Institute in raising the professional and ethical standards of financial analysts and investment practitioners through our continuing education events and advocacy. In addition to promoting the CFA designation in Hong Kong, the Society aims to provide a forum for our members, CFA Institute, other investment practitioners and regulators. For more details, please visit [www.cfahk.org](http://www.cfahk.org).

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