

Postgraduate Diploma in Family Office and Succession Management

Programme Code: FN133A

Application Code: 2350-FN133A

2867 8476

pgdfosm@hkuspace.hku.hk



The programme aims to provide students with a detailed understanding of the multifaceted aspects of family office management. Through a blend of theoretical knowledge and practical applications, the programme seeks to equip students with the necessary skills to navigate the intricate landscape of family wealth management. It will cover a range of topics such as governance structure, investment strategies, succession planning, and ethical considerations specific to family office. The programme helps to cultivate family office professionals to address the evolving needs and complexities of affluent families and their enterprises. After completing the programme, students will be capable of providing professional advice in the specialised realm of family office businesses.

R Applicants shall hold a bachelor's degree awarded by a recognised institution. Those with a business-related degree would have an advantage.

If the degree or equivalent qualification is from an institution where the language of teaching and assessment is not English, applicants shall provide evidence of English proficiency, such as:

- an overall band of 6.0 or above with no subtests lower than 5.5 in the IELTS; or
- a score of 550 or above in the paper-based TOEFL, or a score of 213 or above in the computer-based TOEFL, or a score of 80 or above in the internet-based TOEFL; or
- HKALE Use of English at Grade E or above; or
- HKDSE Examination English Language at Level 3 or above; or
- equivalent qualifications.

Applicants with other qualifications will be considered on individual merit.

\$ HK\$15,000 – HK\$18,000 per module
Application Fee: HK\$150

D 1-3 year

English

Q Level 6 (Reg. No.: 25/000599/L6) Validity Period: 01 Jul 2025 - on-going

Certificate for Module (Family Dynamics and Psychological Aspects in Wealth Management)

Programme Code: FN135A

Application Code: 2390-FN135A

2867 8476 / 2975 5767

pgdfosm@hkuspace.hku.hk



This programme will equip family office professionals with essential tools to navigate complex family dynamics while effectively managing wealth. Students will develop skills in cross-generational communication, decision-making, conflict resolution, and motivation of next-generation family members. They will learn how to manage intergenerational wealth transfers, implement family governance structures, and navigate cultural nuances specific to family office. The programme will emphasise practical applications to preserve family harmony and balance financial goals with family well-being in the context of family office management.

R Applicants shall hold a bachelor's degree awarded by a recognised institution. Those with a business-related degree would have an advantage.

If the degree or equivalent qualification is from an institution where the language of teaching and assessment is not English, applicants shall provide evidence of English proficiency, such as:

- an overall band of 6.0 or above with no subtests lower than 5.5 in the IELTS; or
- a score of 550 or above in the paper-based TOEFL, or a score of 213 or above in the computer-based TOEFL, or a score of 80 or above in the internet-based TOEFL; or
- HKALE Use of English at Grade E or above; or
- HKDSE Examination English Language at Level 3 or above; or
- equivalent qualifications.

Applicants with other qualifications will be considered on individual merit.

\$ HK\$15,000
Application Fee: HK\$150

D 30 hours

English

Q Level 6 (Reg. No.: 25/000637/L6) Validity Period: 01 Jul 2025 - on-going

家族辦公室證書

課程編號：FN094A

報名代碼：2455-FN094A

2867 8476

ecfomwi@hkuspace.hku.hk



本課程旨在令學員了解家族辦公室的功能和運作。透過家族辦公室實例個案，指導學員如何有效地為高端客戶提供投資管理策略和執行的具體方案。

R 申請人應持有副學士學位/高級文憑或同等學歷。

申請人如持有其他同等學歷：或21歲以上及擁有三年理財及財富管理相關工作經驗者，學院將會作個別考慮。

\$ HK\$25,800

報名費用：HK\$150

D 99小時

粵語輔以英語

Q 資歷架構級別：3 資歷名冊登記號碼：23/000234/L3

資歷名冊登記有效期：2023年4月1日 - 持續有效

證書 (單元：家族辦公室成立及資產配置)

課程編號：FN095A

報名代碼：2440-FN095A

2867 8476

ecfomwi@hkuspace.hku.hk



本課程旨在教授學員如何成立家族辦公室，相關的資產配置技巧與注意事項。課程內容包括家族辦公室的概念、營運模式、資產配置、策略選擇與執行步驟。完成課程後，學員能夠因應客戶需要，成立家族辦公室，並提供投資策略建議和訂立確切的執行計劃。

R 申請人應持有副學士學位/高級文憑或同等學歷。

申請人如持有其他同等學歷：或21歲以上及擁有三年理財及財富管理相關工作經驗者，學院將會作個別考慮。

\$ HK\$10,200

報名費用：HK\$150

D 39小時

粵語輔以英語

Q 資歷架構級別：3 資歷名冊登記號碼：23/000235/L3

資歷名冊登記有效期：2023年4月1日 - 持續有效

Certificate for Module (Family Office Management Strategy)

Programme Code: FN077A

Application Code: 2450-FN077A

2975 5767 / 2867 8476

pgdfosm@hkuspace.hku.hk



The programme aims to provide students with essential knowledge in family office management. It will discuss various issues regarding how to establish a family constitution; how to set up a family office in Hong Kong; inheritance, family and business knowledge; and how to handle stakeholders' disputes. The application of trusts in family offices and real-life cases will be discussed. After completing the programme, students can better understand the processes and contemporary issues related to family office management.

R Applicants shall hold a bachelor's degree awarded by a recognised institution.

If the degree or equivalent qualification is from an institution where the language of teaching and assessment is not English, applicants shall provide evidence of English proficiency, such as:

- an overall band of 6.0 or above with no subtests lower than 5.5 in the IELTS; or
- a score of 550 or above in the paper-based TOEFL, or a score of 213 or above in the computer-based TOEFL, or a score of 80 or above in the internet-based TOEFL; or
- HKALE Use of English at Grade E or above; or
- HKDSE Examination English Language at Level 3 or above; or
- equivalent qualifications.

Applicants with other qualifications will be considered on individual merit.

\$ HK\$15,000 per programme
Application Fee: HK\$150

D 30 hours

English

Q Level 6 (Reg. No.: 22/000160/L6) Validity Period: 01 Mar 2022 - on-going

NCR1

This is an exempted course under the Non-Local Higher and Professional Education (Regulation) Ordinance. 根據《非本地高等及專業教育(規管)條例》，本課程屬獲豁免課程。

NCR2

These are exempted courses under the Non-Local Higher and Professional Education (Regulation) Ordinance. 根據《非本地高等及專業教育(規管)條例》，這些課程屬獲豁免課程。

NCR3

The course operator is applying for exemption under the Non-local Higher and Professional Education (Regulation) Ordinance. 課程主辦人正根據《非本地高等及專業教育(規管)條例》辦理豁免註冊手續。

It is a matter of discretion for individual employers to recognize any qualification to which this course may lead. 個別僱主可酌情決定是否承認本課程可令學員獲取的任何資格。

Family Office 家族辦公室

證書(單元：家族辦公室之環球稅務及信託安排)

課程編號：FN096A

報名代碼：2455-FN096A

☎ 2867 8476

✉ ecfomwi@hkuspace.hku.hk



本課程旨在介紹學員家族辦公室之環球稅務及信託安排。透過教授相關的知識，讓學員了解信託法的概念、遺產及熱門國家的稅務條例要點。通過環球案例分享，學員能為高層客戶提供環球稅務及信託安排的具體財務配置計劃。

R 申請人應持有副學士學位/高級文憑或同等學歷。
申請人如持有其他同等學歷：或21歲以上及擁有三年理財及財富管理相關工作經驗者，學院將會作個別考慮。

\$ HK\$7,800
報名費用：HK\$150

D 30小時

🇬🇧 粵語輔以英語

Q 資歷架構級別：3 資歷名冊登記號碼：23/000236/L3
資歷名冊登記有效期：2023年4月1日 - 持續有效

Certificate for Module (Legal and Regulatory Practices for Family Office)

Programme Code: FN134A

Application Code: 2450-FN134A

☎ 2867 8476 / 2975 5767

✉ pgdfosm@hkuspace.hku.hk



This programme will equip students with a detailed understanding of the regulatory environment, legal structures, and reporting requirements for family office, as well as the key legal considerations and strategies for lawyers working with family office. This includes exploring the use of trusts, wills, and other instruments in family office planning and succession, as well as the legal implications of managing various family office assets and engaging in charitable and philanthropic activities. After completing the programme, students will be equipped with the knowledge and skills to address family office's unique regulatory, structural, and asset-related needs.

R Applicants shall hold a bachelor's degree awarded by a recognised institution. Those with a business-related degree would have an advantage.

If the degree or equivalent qualification is from an institution where the language of teaching and assessment is not English, applicants shall provide evidence of English proficiency, such as:

- an overall band of 6.0 or above with no subtests lower than 5.5 in the IELTS; or
- a score of 550 or above in the paper-based TOEFL, or a score of 213 or above in the computer-based TOEFL, or a score of 80 or above in the internet-based TOEFL; or
- HKALE Use of English at Grade E or above; or
- HKDSE Examination English Language at Level 3 or above; or
- equivalent qualifications.

Applicants with other qualifications will be considered on individual merit.

\$ HK\$15,000
Application Fee: HK\$150

D 30 hours

🇬🇧 English

Q Level 6 (Reg. No.: 25/000636/L6) Validity Period: 01 Jul 2025 - on-going

Certificate for Module (M&A and Private Equity Strategy for Family Office)

Programme Code: FN136A

Application Code: 2370-FN136A

☎ 2867 8476 / 2975 5767

✉ pgdfosm@hkuspace.hku.hk



This programme aims to provide students with essential knowledge in Private Equity and M&A markets. It will discuss various issues such as the development of Private Equity and M&A in different regions; the structuring and executing of Private Equity and M&A; the considerations and processes involved in Private Equity and M&A transactions; updated legal and regulatory developments in Hong Kong. Real-life cases will also be discussed. After completing the programme, students will understand how Private Equity and M&A help with family office growth.

R Applicants shall hold a bachelor's degree awarded by a recognised institution. Those with a business-related degree would have an advantage.

If the degree or equivalent qualification is from an institution where the language of teaching and assessment is not English, applicants shall provide evidence of English proficiency, such as:

- an overall band of 6.0 or above with no subtests lower than 5.5 in the IELTS; or
- a score of 550 or above in the paper-based TOEFL, or a score of 213 or above in the computer-based TOEFL, or a score of 80 or above in the internet-based TOEFL; or
- HKALE Use of English at Grade E or above; or
- HKDSE Examination English Language at Level 3 or above; or
- equivalent qualifications.

Applicants with other qualifications will be considered on individual merit.

\$ HK\$15,000
Application Fee: HK\$150

D 30 hours

🇬🇧 English

Q Level 6 (Reg. No.: 25/000638/L6) Validity Period: 01 Jul 2025 - on-going

Certificate for Module (Multi-Generational Wealth Inheritance Strategy for Family Office)

Programme Code: FN137A

Application Code: 2385-FN137A

☎ 2867 8476 / 2975 5767

✉ pgdfosm@hkuspace.hku.hk



This programme aims to provide students with multi-generational wealth inheritance strategies for high-net-worth families. It will cover a range of topics including portfolio management constraints, discussing risk concepts, behavioral biases, asset class returns, passive vs. active strategies, equity securities, fixed income analysis, immunisation strategies, and derivatives securities. After completing the programme, students will grasp essential insights into effective portfolio management practices for family office.

R Applicants shall hold a bachelor's degree awarded by a recognised institution. Those with a business-related degree would have an advantage.

If the degree or equivalent qualification is from an institution where the language of teaching and assessment is not English, applicants shall provide evidence of English proficiency, such as:

- an overall band of 6.0 or above with no subtests lower than 5.5 in the IELTS; or
- a score of 550 or above in the paper-based TOEFL, or a score of 213 or above in the computer-based TOEFL, or a score of 80 or above in the internet-based TOEFL; or
- HKALE Use of English at Grade E or above; or
- HKDSE Examination English Language at Level 3 or above; or
- equivalent qualifications.

Applicants with other qualifications will be considered on individual merit.

\$ HK\$18,000
Application Fee: HK\$150

D 39 hours

🇬🇧 English

Q Level 6 (Reg. No.: 25/000639/L6) Validity Period: 01 Jul 2025 - on-going

See legend on page 033 圖像說明於第033頁

R Minimum Entry Requirements 基本入學要求 (P.017)

\$ Fee 學費

D Duration 修業期

🇬🇧 Medium of Instruction 教學語言

Q Qualifications Framework 資歷架構

E Exemption 豁免

S Short Course 短期課程

For more and latest programme information, please visit our website
有關最新課程資訊及詳情，請瀏覽學院網站 hkuspace.hku.hk