香港保險顧問聯會
THE HONG KONG CONFEDERATION OF INSURANCE BROKERS

Succession Planning Strategies Through Life Insurance	
Date:	7 May 2025 (Wednesday)
Time:	9:30am – 12:30pm (HKT)
Venue:	Room 1501-2, 15/F, Hong Kong Club Building, 3A Chater Road, Central

** The above seminar is a re-run of the webinar on 22 January. We are excited to offer the same session in a face-to-face format to enhance interaction and benefit participants who have missed the last session.*

Course Outline

- The need for succession planning
- Developing strategies for succession planning
- Types of life insurance used in succession planning
- Overview of tax considerations when succession planning
- Case Studies

Speaker

Steve Kean

Steve Kean has over 3 decades of experience in international financial planning and wealth management, with a background that includes strategic and transformation management consulting and establishing and expanding successful life insurance platforms with 2 leading international private banks. Steve has trained thousands of professionals in Europe and across Asia through workshops designed to simplify complex financial concepts. Passionate about empowering others with actionable knowledge, he is committed to elevating industry standards and positive client outcomes.