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## **The Compliance and Ethics of Succession Planning Strategies**

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**Date:** 12 June 2025 (Thursday)

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**Time:** 9:30am – 12:30pm (HKT)

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**Venue:** Room 1501-2, 15/F, Hong Kong Club Building, 3A Chater Road, Central

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*\* The above seminar is a re-run of the webinar on 19 February. 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

- Ethical Considerations
- Compliance Risks and Considerations
- Establishing an Ethical Culture
- 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.