



## HKIAAT CPD Seminar

### Seminar on "Tips for Preparing Financial Forecasts"

<b>Date:</b>	18 May 2017 (Thursday)
<b>Time:</b>	7:00 p.m. – 8:30 p.m.
<b>Venue:</b>	Hong Kong Institute of CPAs Training Centre, 27/F, Wu Chung House, 213 Queen's Road East, Hong Kong
<b>Speaker:</b>	<p><b>Mr. Joe Yan, CFA</b> Senior Manager, Transaction and Valuation Advisory Services, RSM Hong Kong Consulting Limited</p> <p>Mr. Yan is responsible for the appraisal of business enterprises, purchase price allocation, intangible assets and financial derivatives such as employee share options, convertible bonds, financial guarantees and foreign exchange forward contracts. Apart from valuation advisory, he also assists clients in developing financial models for fund raising and M&amp;A purposes. Mr. Yan received a Bachelor degree in Business and Finance from the Hong Kong Polytechnic University. He is also a Chartered Financial Analyst (CFA) charterholder.</p> <p><b>Mr. Noah Wong, CPA, FRM, MFIN</b> Manager, Transaction and Valuation Advisory Services, RSM Hong Kong Consulting Limited</p> <p>Mr. Wong provides services for valuation of business enterprises, intangible assets, financial instruments, employee share options, financial guarantees and convertible bonds for financial reporting and transaction support purposes. Mr. Wong provides valuation audit services and also assists clients in building financial models for various sectors and listed companies.</p>
<b>Medium of instruction:</b>	Cantonese
<b>Course outline:</b>	<p>Preparing realistic financial forecasts is one of the critical steps of presenting the prospect of an entity to interested parties. This seminar will provide an overview of forming financial forecasts and projections generally accepted by auditors, regulators and investors.</p> <p>In this seminar, the speakers will cover:</p> <ul style="list-style-type: none"><li>• The importance of reasonable and defensible financial forecasts and projections</li><li>• An introduction to generally accepted assumptions behind prospective financial information</li><li>• Practical tips and examples on preparing prospective financial information</li></ul>
<b>Fee:</b>	<ul style="list-style-type: none"><li>➤ HK\$60 for HKIAAT members / students</li><li>➤ HK\$90 for non-HKIAAT members / students</li></ul>
<b>Closing date:</b>	4 May 2017 (Thursday)

To enrol, please complete and send the enrolment form together with payment to the HKIAAT on or before **Thursday, 4 May 2017**.



## Enrolment Form for CPD Seminar

(Please read the details of the seminar(s) carefully before you complete this form.)

**CPD Seminar 34 – " Tips for Preparing Financial Forecasts" on 18 May 2017**

**(Enrolment deadline: Thursday, 4 May 2017)**

### I. Personal particulars

- I would like to enrol for the CPD seminar indicated above.

Name: \*Mr/Mrs/Ms/Miss \_\_\_\_\_ (English) \_\_\_\_\_ (Chinese)

Membership No. / Student registration no. \_\_\_\_\_ Telephone no.(Day-time) \_\_\_\_\_

E-mail (**must be provided**): \_\_\_\_\_

- I would like to enrol for the CPD seminar indicated above for \_\_\_\_\_ guest(s).

*Please use additional form if needed.*

Name of guest: \*Mr/Mrs/Ms/Miss \_\_\_\_\_ HKID card no. \_\_\_\_\_

E-mail (**must be provided**): \_\_\_\_\_ Telephone no.(day-time) \_\_\_\_\_

### II. Payment

HK\$ 60 per head for HKIAAT members / students: \_\_\_\_\_ person(s)

HK\$ 90 per head for non-HKIAAT members / students : \_\_\_\_\_ person(s)

**Total amount: HK\$** \_\_\_\_\_ Cheque no.: \_\_\_\_\_ Bank: \_\_\_\_\_

\_\_\_\_\_  
Signature of applicant

\_\_\_\_\_  
Date

- Check as appropriate.

\* Delete as appropriate.

# Confirmation will be sent to applicants by email three days prior to the seminar.

#### Notes:

1. Return the completed enrolment form together with payment to the HKIAAT before the enrolment deadline for the seminar. Enrolments will be processed on a first-come-first-served basis with priority given to registered members / students. Fees paid will not be refunded if the applicant subsequently withdraws.
2. Cheques should be made payable to "Hong Kong Institute of Accredited Accounting Technicians Limited". A surcharge of HK\$150 will be levied on every dishonoured cheque.
3. The HKIAAT reserves the right to change the speaker, date, venue and time of the seminar should this be necessary. If the event is cancelled, the admission fee will be returned to participants by mail.

#### Mailing label for use

**To: Hong Kong Institute of Accredited  
Accounting Technicians Limited**  
27/F, Wu Chung House,  
213 Queen's Road East,  
Wanchai, Hong Kong  
**HKIAAT CPD Seminar**