

Curriculum Vitae of Carol Choi

Personal Particulars

Name: Choi Wai Sze, Carol
Address: Flat A, 10/F., Block 4, La Cite Noble,
Tseung Kwan O, N.T., Hong Kong
Telephone: (852) 9668-9974
E-mail: mitone2013@gmail.com

Working Experience

Wealth and Tax Planning Officer

in Bank Julius Baer & Co. Ltd.

Duration: April 2014 to present

Job Duty: preparing presentation slides and proposals for clients who look for asset protection and/or estate planning. Drafting Letter of Wishes, preparing trust documentations; liaising with trustees, law firms, registered agents and insurance brokerage companies related to trust set up, legal advice and insurance policies for the prospects of the bank.

Financial Planning Manager

in Manulife (International) Limited

Duration: October to December 2013

Job Duty: assist clients including individuals and corporations to choose the best policy that suit their needs. The products cover life, critical illness, hospitalization, savings, MPF etc

Senior Manager - Business Development

in Heritage Trust Group, Hong Kong (acquired by Equiom in 2016)

Duration: February 2009 to August 2013

Job Duty: set up the company from scratch, give advices on corporate structure of companies in different jurisdictions, target and identify professionals and HNW individuals to develop and maintain the network of business contact, maintain and expand the set up of HK and offshore companies as well as trust structure for overseas clients in majority, back up works including the incorporation of companies, liaising with auditors of accounting and auditing issues, applying for working visa and CIES, keeping and maintaining the statutory requirements for both HK and offshore companies.

Business Development Manager

in Lynch Consultancy Limited (merged with ATC (Hong Kong) Ltd in Nov 07)

Duration: February 2006 to November 2008

Job Duty: mainly to handle new clients' enquiries by giving advisory on incorporation in different jurisdiction, arranging for legalization documents, setting up the bank accounts, applying for the certificates from the BVI Registry/Agent etc, as well as supervising my subordinates on problem solving on change of company structure, back up works regarding the merger and acquisition deals, keep and maintain the statutory requirements for both HK and offshore companies.

Company Secretarial Officer

in Moores Rowland Mazars, Chartered Accountants, Certified Public Accountants

Duration: August 2004 to February 2006

Job Duty: not only to perform routine works such as preparing Annual Returns and Annual General Meeting papers, maintaining and updating statutory records for the Hong Kong companies, but also require to perform ad-hoc works such as drafting Board Minutes on various cases, prepare documents for amendment Memorandum & Articles of Association, incorporation of Hong Kong/overseas companies, deregistration of Hong Kong companies, handling funds transfer/payment for clients and other administrative matters etc.

Company Secretarial Assistant

in King & Company, Solicitors & Notaries

Duration: August 2001 to August 2004

Job Duty: performing routine and ad-hoc works stated above excluding the handling of funds transfer/payment for clients. I also responsible for registration of trade marks in Hong Kong and overseas.

Company Secretarial Assistant

in M. B. Lee & Co., C.P.A. Ltd.

Duration: August 1997 to July 2001

My duties of work are similar to the job I worked in King & Company, except the handling of the trade mark matters.

Education

Hong Kong Baptist University Bachelor degree in Business (Administrative Management)	2004 - 2006
Morrison Hill Technical Institute Diploma in Company Secretaryship & Administration	1995-1997
Sacred Heart Canossian Commercial School Certificate in Executive Secretary	1993-1995
Concordia Lutheran Secondary School HKCEE	1988-1993

Academic Achievements

STEP Diploma in International Trust Management

- Completed Company Law & Practice
- Completed Trust Creation: Law & Practice
- Completed Trustee Investment & Financial Appraisal

LCCI (Pass with Distinction)

- Book-keeping
- Typewriting

Pitman (Intermediate)

- Office Procedure
 - English for Business Communication
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Referee

Available upon request

Availability

One month notice
