

FOAHK 2026 Case Competition

Intelligent Portfolio Architecture: Alternative Investments and Legacy Governance

Looking to connect with the evolving family office ecosystem?

Participants will have access to an exclusive training webinar and the opportunity to work closely with industry veterans. Shortlisted teams will receive mentorship from experts in leading banks, family offices, and asset management firms. They will also have the chance to present their ideas to seasoned industry professionals.

Theme

Intelligent Portfolio Architecture: Alternative Investments and Legacy Governance

In the AI-first economy, managing family wealth is more than asset allocation: you're an architect, building resilient, intelligent cross-generational structures to protect and grow wealth.

This year's competition calls you to this role: leverage AI for forward-looking portfolios, and embrace AI as a core thematic opportunity. Your journey begins with an initial AI-enhanced strategy, then navigates real family dynamics: designing robust trusts, establishing governance, and implementing human-centric AI ethics. Wealth inheritance is not just numbers, but rooted in structure and purpose.

Register Now!

Registration Deadline

15 Dec 11:59 PM (HKT/SGT)



Key Timeline

- Exclusive Webinar
13 Dec 10 am - 11 am (HKT/SGT)
- Round 1 Release
17 Dec 12:00 pm (HKT/SGT)
- Round 1 Deck Submission
24 Dec 12:00 pm (HKT/SGT)
- Round 2 Release
19 Jan 12:00 pm (HKT/SGT)
- Round 2 Deck Submission
2 Feb 12:00 pm (HKT/SGT)
- Final Presentation
6 Feb 1:30 pm - 5:00 pm (HKT/SGT)



About FOAHK

(Family Office Association Hong Kong)

The FOAHK is an independent family office trade association established in November 2020. As a nonprofit consultative industry body, the FOAHK represents family offices serving ultra-high-net-worth (UHNW) individuals and their families on governance, legislative, and regulatory matters.



Mr. Grant Ko
Vice Chair of FOAHK;
Board of Director, Education
Committee of FOAHK;
Chairman of Wisdom Group Holdings

Awards

Champion

- Cash prize - \$5000
- Summer Internship fast-track opportunities with 10+ asset management & investment services firms
- Inducted into the FOAHK Case Competition Hall of Fame, receiving exclusive FOAHK networking resources and eligibility to participate in Education Committee activities (panel discussions, on-site visits, etc.) for the next year.

1st runner up

- Cash prize - \$3000
- Summer Internship fast-track opportunities with 10+ asset management & investment services firms

2nd runner up

- Cash prize - \$2000
- Summer Internship fast-track opportunities with 10+ asset management & investment services firms

Finalists

- On-site visits to top banks and asset management firms
- Publication on FOAHK's social media platforms, newsletter, and website
- Certificate and recommendation letter from FOAHK

Who We Are Looking For

- Full-time undergraduate & graduate students or recent graduates from all majors across the globe are welcome.
- Students from different universities within the same region may form a team. However, cross-region teams are not permitted.
- Each team must consist of 3-4 students and submit one online registration form before 15 December 2025.
- Each team must nominate a team captain who will be responsible for submitting the registration and receiving all competition material.

STAGES OF THE COMPETITION

01

Round 1 will center on **AI-powered portfolio construction** for family wealth. Teams will receive the case on **December 17, 2025 at 12:00 PM HKT**, focusing on using AI tools for asset allocation, risk assessment, and digital investment themes.

02

Round 2 will build on Round 1, requiring teams to dive deeper into family trust structuring, intergenerational governance, and AI-driven portfolio optimization. Shortlisted teams will get the case on **January 23, 2026, at 12:00 PM HKT** and be paired with industry mentors specialized in AI finance and family office strategy.

Deck Submission & Presentation Requirements

- All decks and oral presentations should be conducted in **English** only.
- Round 1 - Participants should submit their PowerPoint deck in PDF format of **not more than 15 slides** (excluding cover page, agenda, and executive summary). A font size of at least 15 and 1.0 line spacing should be adopted.
- Round 2 - The final presentation will consist of a 15-minute presentation followed by a 10-minute Q&A on **[6 Feb 2026]**. Finalists will present their cases to experienced industry practitioners and government representatives. Teams in Hong Kong will conduct their presentation in-person, whilst those outside of Hong Kong will present virtually.

Learning Outcomes - What to Expect



Master how to use AI to optimize portfolio performance, align family investment goals, and navigate regulatory landscapes in wealth management.



Gain practical skills in AI-powered due diligence, trust structuring, and family office operations through expert mentorship and industry training.



Network with leaders in finance, private banking, and family offices, expanding your insights into the intersection of technology and multi-generational wealth preservation.

Exclusive Webinar

Time: 13 Dec, 2025 10AM - 11AM (HKT/SGT)

- Introduction to Alternative Investments---presented by Evan CHENG, CFA FRM, Product Director, ARK Wealth
- Introduction to Trust---presented by Vicky Zhang, Senior Product Director, ARK Wealth



Evan CHENG
ARK Wealth



Vicky Zhang
ARK Wealth

Interview opportunities with:



and more...

Industry Mentors



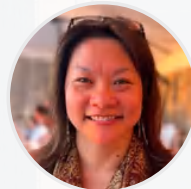
Jessica Jones
Managing Director,
Head of Asia
PGIM



Marco Tsang
Associate Director,
Client Relations &
Capital Raising
EQT Private Wealth



Steven Lee
Head of FIM, External
Asset Management
Standard Chartered
Private Bank



Jennifer Hsieh
Senior Student Advising
Officer, Master of Family
Wealth Management
University of Hong Kong



Victor Liu
Executive Director
Goldman Sachs



Jamie Cheng
Principal
Global Client Solutions,
Hong Kong
KKR

Judges



Grant Pan
Group CFO / CEO
Noah Holdings / ARK
Wealth Hong Kong



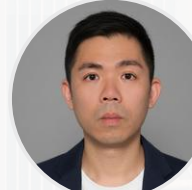
Neil Tan
Managing Director /
Chairman
Tsunami Advisors/
AIHK



Bonnie Leung
Chair
Family Wealth
Management Program,
University of Hong
Kong



Linwen HO
Professor of Practice
(Finance)
The Hong Kong
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Maximilian Wong
Executive Director
The Keswick Foundation



Edmond Lau
Senior Investment Director,
Far East Consortium
International Ltd

and more to announce...