

Seminar

Expats & Professionals in Greater China: Retirement Planning Opportunities & Challenges

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12:30 – 1:30 pm

New Venue: Room 723

7/F Cheng Yu Tung Tower

The University of Hong Kong



Successful global mobility management constitutes more than ever a skillful balancing act and leads companies to use flexible and innovative solutions. Global mobility is changing for employees and employers alike. Companies, for example, increasingly look for smarter ways to manage expatriates. Over the past decade, many companies have moved from one-size-fits-all policies to more segmented policies designed to meet the requirement of different types of assignments and expatriates. Managing expatriate allowances, in particular, requires smarter approaches. Maintaining expatriate benefits such as pension and healthcare also continue to represent thorny issues for many companies. The legal implications, from a planning perspective for both the employer and employee, are often overlooked. For an expatriate in Greater China who is approaching retirement, planning for how assets in a retirement plan are to be converted into income is of utmost importance. This seminar will discuss key legal issues for employers in Greater China, and Hong Kong, who employ or seek to employ expatriates from Australia, the United States, Canada, and the United Kingdom. On the flipside, an employee from one of these jurisdictions who may be fast approaching retirement, should be informed about certain challenges, including: volatility, inflation, longevity, taxation and estate planning, and how best to address them. Taxation implications for both the employer and employee (with a focus on employees approaching retirement) are discussed, and will include: pension and retirement plans unique to the above jurisdictions, taxation and property planning strategies for expatriate employees and professionals employed in Greater China, Estate and gifting considerations, also legal disclosure requirements. Adding to these global mobility policy and legal issues, the regional specificities presenting as a challenge to the adaptability of companies' policies are also discussed.

Sarah Hinchliffe is an Assistant Professor of Tax and Accounting at the University of Akron, and specializes in U.S., International and Comparative Taxation Law, also Trusts and Estates. Professor Hinchliffe is an Australian Lawyer as well as a Chartered Tax Advisor, an Associate member of the Law Institute of Victoria, and of the Taxation Institute of Australia. She has practical experience in the area of taxation law having worked for the Australian Taxation Office and in private legal practice. Professor Hinchliffe is a co-founder of a boutique law firm based in Melbourne, Australia. She has held a number of international academic appointments, including at Harvard Law School, the College of William and Mary, Boston University School of Law, the University of Nevada William S. Boyd School of Law, the University of Hong Kong, the University of Melbourne, Monash University, Victoria University, and the Taxation Institute of Australia. Professor Hinchliffe has been an external editor for the Law Institute Journal, Editor in Chief of the Journal of Australian Taxation, and has been engaged by the Productivity Commission as a consultant.

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