

Introduction of Facilitator 導師簡介

Ms Agnes K Y Tai

Ms. Tai is a Director of Great Glory Investment Corporation and Senior Advisor of a Hong Kong single family office, with focus on ESG-investing. She serves on the training committee of the Hong Kong Institute of Directors (HKIoD) as Deputy Chairperson and the board of Hope of the City, on advisory boards of Shao Ming Lo Foundation, Fred Hollows Foundation and Habitat for Humanity Hong Kong, as committee member of GARP Hong Kong Chapter, and as consultant of Asian Charity Services and their NGO clients.

In her 39 years of serving the financial community in China, Hong Kong SAR, the USA and Australia, she has established and managed investment companies, consultancy practices, and new business units within major financial institutions. She facilitates training for the HKIoD and other institutions in governance, sustainability, strategy and risk management. She is a holder of Type 1, 2, 4, 5 and 9 licenses issued by the Hong Kong Securities and Futures Commission.

Ms Tai was Director of Great Glory Strategies Limited (GGS), Project Advisor of Booz & Co. in Greater China, CRO-designate of Shanghai AJ Trust Co., Founding Director of Peregrine Asset Management (Hong Kong) Limited, Head of Risk Management of Westpac Banking Corporation, and held senior positions in Citicorp, Bank of America and Mingly Corporation. She took a sabbatical GGS to be Chief Executive Officer of Habitat for Humanity Hong Kong Limited and Executive Director of Bai Xian Asia Institute. She served on the board of KELY Support Group as Vice Chairman and SX Foundation.

She is a Global Association of Risk Professionals (GARP) certified Financial Risk Manager (FRM), a Chartered Alternative Investment Analyst (CAIA) and a Palladium Group (Professor Kaplan and Professor Norton) Balanced Scorecard certified practitioner. She is a Fellow member of HKIoD, member of Asia Society and Hong Kong Association of Christian Accountants (HKACA).

She has an MBA from the University of Chicago - Booth School of Business in USA, a BSc (Honors) from Roosevelt University in USA, and is a graduate of the Stanford University Senior Executive Leadership Program as well as the 2011 Stanford Directors' College. She is pursuing PhD studies at the Hong Kong University of Science and Technology and has authored a book on investing in H-shares in 1993 and a Harvard Business case in 2013.