

Introduction of Facilitator 導師簡介

Ms Agnes K Y Tai, MBA, FRM, SCR, CAIA, FHKIoD, PhD candidate

Ms. Tai is a Director of Great Glory Investment Corporation, Senior Advisor of a Hong Kong single family office and Senior Partner of Yaozhi Asset Management International. She is an External Review Panel member for the MTR Corporation sustainability reports since 2014, a juror for WealthAsia (Benchmark) Funds of the Year Awards, a Publishing Board of Magazine member and a Deputy Chair of the training committee of the Hong Kong Institute of Directors (HKIoD), board member of Hope of the City, advisory board/committee member of Global Association of Risk Professionals (GARP), Fred Hollows Foundation and Shao Ming Lo Foundation. She is a holder of RA 4, 9 licenses issued by the Securities and Futures Commission in Hong Kong, and Sustainability and Climate Risk Certificate issued by GARP.

In her 41 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 on governance, ESG, sustainability, strategy and risk management, and is a speaker on ESG/sustainable investing & non-profit governance.

She 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 was Chief Executive Officer of Habitat for Humanity Hong Kong Limited and Executive Director of Bai Xian Asia Institute.

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, a BSc (Honors) from Roosevelt University in USA, and is a graduate of the Stanford University Senior Executive Leadership Program and the 2011 Stanford Directors' College. Her PhD thesis at the Hong Kong University of Science and Technology is focusing on sustainable investing. She has authored a book on investing in H-shares, a Harvard Business case and recently a positive psychology book 'Tall Miracles'.