



**Mr. Vincent, Lok Tung LEE**

BA(Hons)IBS, CWMP, FchFP, MFP, MWM

Vincent has over 20 years' experience in the Wealth Management industry and is currently the Executive Director of IABFM Asia. In his role, Vincent oversees the operation running of the business and the IABFM Asia and Greater China Executive team, whilst retaining responsibility for key client relationships.

In 2003, Vincent started the training and wealth management business with his resources in mainland China and Hongkong. He obtained authorised official training centre operation right from IABFM (International Academy of Business and Financial Management), a non- profit based training institute. He provided certified wealth management programs to major banks in mainland China, which includes China Construction Bank, Agricultural Bank of China, Bank of China, Communication Bank of China and etc. He trained more than 30,000 wealth mangers, private bankers, insurance

consultants and family business owners. He established a membership based supporting office to provide family offices and wealth management backend services to the HNWLs for setup of funds, trusts, and family offices from the members' referrals.

Vincent has in-depth industry knowledge and excellence across a range of technical disciplines, to provide services in overseas funds, trusts and investment structures for Asian family businesses.

- IABFM Greater China, Executive Director
- Yozma Fund, Partner
- 中關村京港澳青年創業創新中心平行基金負責人