

Private Wealth — Non-Contentious

OVERVIEW

Robertsons' Private Wealth team offers a full compliment of estate planning services to its private clients.

Our team advises on all aspects of the drafting and preparation of individual wills. We work with clients to gain a full understanding of their assets, needs and requirements and also their long-term wishes so as to tailor appropriate wills to best meet their circumstances. We also advise on both the position of Hong Kong wills and dispositions in relation to international estate planning, as well as addressing other practical concerns of clients such as living wills, advance directives, enduring powers of attorney and guardianship arrangements.

In addition, we also work with our clients on various method of establishing trusts and advise on lifetime gifts and settlements as well as other forms of estate planning.

We have considerable experience in applying for and receiving grants of representation, and also act on resealing applications of overseas grants and cross-jurisdictional estates. Our team also advises on the administration and distribution of estates. Our partners have acted as the executors on many wills and we have significant experience in the operation and settlement of estates.

THE TEAM



Andrew Lee
Partner



Lesley Mclean
Partner



Cecelia Kwan
Associate



Katie Lau
Associate



Susanna Cheung
Consultant

AWARDS & RECOGNITION



Private Wealth Law Fi...
ALB Hong Kong Law Awards, Asian Legal
Business
2025



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Private Wealth Law Fi...

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EXPERIENCE

- ◆ Acted for a major distributor of beverage products in Hong Kong in a case brought by the Customs Department of the Hong Kong Government involving dutiable commodities. This case remains the leading case on the Hong Kong Bill of Rights. After this case, it became established law that, whilst the prosecution does not have to prove knowledge in a strict liability offence, it will be a defence for the accused to prove, on a balance of probabilities, that it had an honest and reasonable belief of compliance with the requisite legal requirements.
- ◆ Leading a team advising three major banks in Hong Kong on investigations by The Hong Kong Monetary Authority and the Securities and Futures Commission concerning the alleged mis-selling of Lehman Brothers related investment products.
- ◆ Leading a team to advise an Insurance Company (a joint venture between 5 renowned financial institutions) to proceed a claim against staff misappropriating funds belonging to the company, which includes the taking out of a mareva injunction order to freeze the assets of the Defendants, and the taking out of Norwich Pharmacal Discovery Orders to proceed with the tracing claim on the misappropriated funds.
- ◆ Leading a team to advise a Hong Kong main board listed company in the purchase of a renowned chain of regional coffee shops. Also advised the same company in the sale of the coffee shop chain to a PRC State Company.
- ◆ Advising a Hong Kong main board listed company on its joint venture with a western restaurants chain to become the biggest western restaurants chain in Hong Kong (with over 40 restaurants) after the joint venture.
- ◆ Advised a main board listed company in the sale of its shares by the major shareholder which led to the making of a general offer to shareholders under The Hong Kong Code on Takeovers and Mergers.
- ◆ Leading a team to advise a main board listed company in the acquisition of a company holding landed properties in the PRC which transaction was classified as a major acquisition of the company.
- ◆ Leading a team in representing issuers or their sponsors on their listing on the Main Board and Growth Enterprise Market of the Stock Exchange of Hong Kong Limited. Recent successful listings include: - Food Wise Holdings Limited (Stock Code: 1632), Anchorstone Holdings Limited (Stock Code: 1592) and Best Linking Group Holdings Limited (Stock Code: 8617).
- ◆ Advising clients in respect of trademark disputes including oppositions and cancellation applications.
- ◆ Representing a wide range of organizations, manufactures and retailers in respect of their worldwide trade mark portfolios including handing of trade mark filings.
- ◆ Advising clients in respect of co-existing with similar brands and negotiating co-existence agreements.

- ◆ Advising clients in respect of problematic applications including attending trade mark hearings.
- ◆ Handling commercial transactions for the exploitation of intellectual property rights through licensing, distribution and franchising agreements.
- ◆ Providing practical advice to clients to increase the value or performance of their IP portfolio.