

SIU Wing Yan Winnie

JD EMBA BA(HONS)



Personal Profile

Ms. Winnie SIU has more than 20 years of experience in private wealth management. Prior to coming back to Hong Kong for her career advancement, Ms. Siu had worked for the Bank of Montreal for many years. She specializes in the areas of financial planning and investment, private wealth management, strategic philanthropy, and immigration. She is now Assistant Vice President of Dynasty Financial Group Limited and Consultant to Wisdom Succession Consultancy Limited.

Professional Qualifications

Canadian Securities Institute (Toronto) – Accredited Financial Management Advisor

Canadian Securities Institute (Toronto) – Accredited Personal Financial Planner

Institute of Canadian Bankers – Investment Funds Examination

Hong Kong Securities & Investment Institute – Hong Kong Securities Practicing Certificate

Hong Kong Insurance Authority – Insurance Intermediaries Qualifying Examination

Academic Qualifications

University of Hong Kong

Juris Doctor

City University of Hong Kong

Executive MBA

University of Toronto, Canada

BA (Hons)

Honorary, Charitable & Community Services

Hong Kong Bankers Club – Club Secretary

City University of Hong Kong EMBA Association – Secretary

Department of Marketing, City University of Hong Kong –

Honorary Think Tank Advisor

CityU Industrial & Business Leaders Circle – Member