

BM INTELLIGENCE

GROWING YOUR WEALTH

孕育您的财富



BMI Funds Management Limited
邦盟汇骏基金管理有限公司

BMI Funds Management Limited

> BMI Funds Management Limited has embarked on providing financial advisory and portfolio management services to our customers. We are a leading investment management expert in Hong Kong, which provides professional and impartial advice on wide range of financial services; we aim to help investors achieving their financial goals with their best interests. Our target is to serve global institutional and individual clients in Hong Kong and, as soon as the market opens up, to become the industry pioneer in China. At the same time, as an independent financial intermediary, we provide a comprehensive range of financial products and services from the world's leading banks, financial institutions, insurance companies and fund management firms to meet clients' various demand.

A reliable partner is the one who listens to you, plans ahead for you, proposes to you on your best interest and tries to reduce your risk to achieve the goals.



邦盟汇骏基金管理有限公司

> 邦盟汇骏基金管理有限公司致力于为客户提供专业的财务建议及投资组合管理。我们是一间香港市场中，处于领先地位的独立基金管理公司，提供专业及中立之理财策划方案，以客户之利益为首，专注于为客户达到理财目标。邦盟汇骏基金管理作为独立的理财中介顾问，扎根香港，放眼世界，对即将进一步开放的中国大陆市场尤其雄心，锐意成为国内理财服务先锋。我们以跨国公司、本地企业公司及个人客户为服务对象，并积极搜罗世界各大银行、金融机构、保险及基金管理公司的多元化金融产品，为客户制订最佳的理财方案。

一个可靠的理财伙伴，不单会聆听您的需要并及早为您计划，提出最有利于您的方案并减低风险，实践您的目标。



BM INTELLIGENCE

> AS A MEMBER OF BM INTELLIGENCE GROUP

邦盟汇骏集团成员

BM Intelligence Group is founded in 1995, which is a leading provider of intellectually based, one-stop professional consultancy services for private and corporate clients in Asia Pacific Region. It provides tailor-made corporate consulting and financial services to both companies and individual clients. The group operates more than 10 specialist divisions and has also established branch offices in Shanghai, Beijing, Xiamen, Shenzhen, Singapore and so forth.

邦盟汇骏集团于1995年成立，是亚太区著名的商业财务顾问，致力为企业及私人客户提供智慧为本的一站式专业顾问及金融服务。旗下分设多个专业服务团队，并于上海、北京、厦门、深圳及新加坡等地设有分行。

> A PROFESSIONAL ONE-STOP SHOP GIVES YOU NO WORRIES

专业的一站式服务令您无后顾之忧

Everybody claims it is a one-stop shop, but none can compare with BMI Group. We provide extensive network in the business and investment financial services, from pre-IPO consultancy, auditing, company secretaries, corporate finance, asset appraisal, investment management, merger & acquisition and so forth; we also provide full range of personal financial services, from fund investment, securities trading, insurance consultancy, MPF advisory, immigration plan, real estate agency, tax planning and more. You can access our services through the internet from all over the world with a multi-language platform. We connect over 160 business partners and provide clients multi-language weekly reports. You can also check the performance of investment and our services easily. In the future, we keep expanding our quality services to serve you better.

坊间都有很多自称可提供一站式服务的公司，但都难以与邦盟汇骏比较。我们可提供全面的多项专业服务，由上市前顾问、核数、公司秘书、融资、资产估值及收购合并服务等应有尽有；在个人理财方面，我们亦提供基金投资、证券买卖、保险代理、强积金顾问、投资移民、房地产代理、税务安排等多元化服务。我们全球联系了超过一百六十个商业合作夥伴。客户及合作伙伴同时可以透过互联网，利用我们的多种语言平台，随时随地查询投资表现和掌握我们最新的服务资讯。未来日子，我们会致力不断提供更全面及更高质素的服务。



> WEALTH IN ACTION

BECOMING YOUR BUSINESS PARTNER

创富力行

— 成为您最佳理财拍档

- > We value our customers' time. We treat our clients as partners, we work with you to set goals and adopt the best strategy in terms of your risks and returns in current situation.
- > We provide innovative solutions, using advanced technology, without losing sight of our traditional values which keep providing top quality services to establish long-term relationship with our customers.
- > We always want to ensure your income flow continuously during different stages of your life, so we will guide you to adjust the risk and return of your investment accordingly.
- > Our advisors will let you know correlation between asset classes is the key for full diversification, also focusing on creditworthiness and reliability of product providers.



- > 我们知道客户分秒必争，作为您的忠诚夥伴，我们与您合力订立目标，按照您对风险与回报的立场及个人选择，策划最佳的理财方案。
- > 我们一方面保持我们固有的原则理念，通过提供优质服务与客户建立长期的关系；另一方面提供创新投资产品，并发掘创新的理财解决方案。
- > 要确保客户收入源源不绝，就需根据个人的生活模式及不同年龄的需要，在投资组合中加入不同的项目以提高回报，并调节投资风险。
- > 我们的专业顾问会让你清楚知道，要全面分散风险，最重要是留意各资产间的相关性，更会聚焦于产品供货商的评级和可靠性。

> INTELLECTUAL ADVANTAGES

知识优势 · 别具智慧

- > We are a highly regulated licensed corporation under the Hong Kong Securities & Futures Commission (SFC) with Type 1 Securities Dealing, Type 4 Investment Advisory and Type 9 Assets Management. Being a member of The Hong Kong Confederation of Insurance Brokers (CIB), we are authorized to provide advice on long term insurance and investment-linked insurance to the best interest of our customers. Moreover, we are also a registered intermediary under Mandatory Provident Fund Authority (MPFA), so we can also provide advices on MPF Scheme.

我们是持有专业牌照的法团，拥有香港证券及期货条例(SFC)下的三类牌照，分别是第一类证券交易、第四类就投资提供意见及第九类提供资产管理。本公司亦是香港保险顾问联合会(CIB)会员，可为客户提供长期保险及投资相关连保险的服务。此外，我们亦是积金局(MPFA)的注册中介人，可以就强积金计划提出建议。

- > Our team members are professionals with industry credentials that range from Chartered Financial Analysts (CFA), Certified Financial Planners (CFP), Chartered Accountants, Chartered Company Secretaries, Chartered Surveyors, legal advisers and so forth.

属下团队汇聚特许财务分析师(CFA)、执业理财规划师(CFP)、特许会计师、特许公司秘书、特许测量师、法律顾问等业内专才。

> FINANCIAL INSPECTION TOUR

- > Through this financial inspection tour, our clients can visit Hong Kong and Singapore, so that our clients have chance to experience the two most important financial hubs for wealth management in Asia.
- > Through BMI, our clients can get connection with overseas financial institutions and even explore business expansion to overseas.
- > Our clients will visit fund houses, insurance companies or other professional firms within the tour. This can let our clients understand more about their operation and competitive advantages.
- > Our clients can attend courses from universities or professional training firms and share updated overseas investment ideas from professionals.

- > We manage over HK\$400 million assets and have more than 6,000 clients under discretionary management which are from China, Japan, Korea and Hong Kong.

我们管理超过四亿港元以上的资产，拥有超过六千个客户分别来自中国、日本、韩国及香港等地。

- > To provide the updated and insightful analysis on financial market, we organize and hold investment seminars with our famous financial experts. Our investment professionals are famous anchors in media and regularly appear on different channels, including TV programs (e.g. CNBC, Bloomberg and TVB), radios, newspapers and magazines.

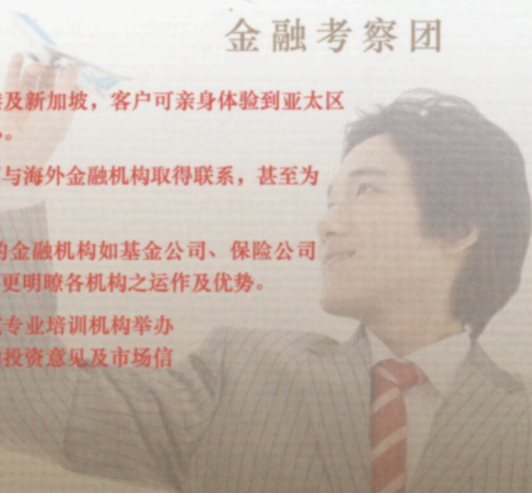
为了提供最新及独到的金融市场分析，我们定期举办不同的投资讲座及研讨会。我们汇集了不少业内专才，并在不同的媒体中主持财经节目、亮相及发表意见，如电视（美国CNBC、香港无线电视及彭博理财）、电台及报章杂志。

- > Through the in-depth analysis from our research team with our centralized portfolio management system, we are confident to provide the best portfolio management services and offer professional advices to our customers.

透过我们专业的资产研究分析及公司先进的中央资产管理组合系统，邦盟汇骏基金管理团队有信心为客户提供专业的资产管理服务及理财意见。

金融考察团

- > 通过这金融考察团到香港及新加坡，客户可亲身体验到亚太区内两个最重要之金融中心。
- > 客户藉着我们之安排，可与海外金融机构取得联系，甚至为其业务拓展至海外市场。
- > 客户会被安排参观当地的金融机构如基金公司、保险公司或其他专业团队，使客户更明瞭各机构之运作及优势。
- > 客户可参与当地的大学或专业培训机构举办的课程，从而得到最新的投资意见及市场信息。



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Have suggestions or opinions for us?

Enquiries about our services?

Request for after-sales service?

Or any other issues?

Please feel free to contact us via the following ways.

Our customer service team is ready to serve you.

如阁下想查询我们的产品或服务，或对我们的服务有任何意见或建议，均可联络我们，我们的客户服务团队乐意为阁下提供服务！

BMI Funds Management Limited 邦盟汇骏基金管理有限公司

> Suite 903-906, 9/F., Shui On Centre,
6-8 Harbour Road, Wanchai, Hong Kong
香港湾仔港湾道6-8号瑞安中心9楼903-06室

> Telephone Hotline 热线电话:

Cantonese/English 英语/粤语: 852-3582 2777

Putonghua 普通话: 852-3582 2706

Japanese 日语: 852-3582 2722

005-3116 0792

> Website 电邮:

www.bmifm.com

> WHAT WE OFFER

服务范围:

Our balanced portfolio covers the following services and products tailored to your individual needs.

切合个人需要的投资配套方案

Wealth Management 理财策划

> Tax Planning 各类税务策划

> Retirement Planning 退休管理计划

> Immigration Investment Plan 投资移民计划

> Estate Management & Trusts 遗产及信托管理

Financial Tools 财务工具

> Fund Establishment Service 投资基金成立

> Insurance Protection 全面保险配套

> Securities Trading 证券买卖服务

> MPF & Pension Consulting 积金顾问服务

Fund Management 基金管理

> Equity & Bond Funds 股票及债券基金

> Regional & Sector Funds 地区及行业基金

> Guaranteed Return Products 保证回报产品项目

> Alternative Investment 另类投资

Professional Services 专业服务

> Financial IT Solutions 理财技术解决方案

> Investment Seminar 投资讲座及研讨会

> Financial Inspection Tour 金融考察团

> Professional Continuous Training 持续进修课程

