CHAPMAN
CRAIG

GROWING & PROTECTING YOUR WEALTH





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财富增值及保障

INVESTING IN YOUR FUTURE, TOGETHER

There are many firms in Asia that can offer financial services to moneyed investors such as yourself. There are the international giants with global reach and resources that you need; and there are the boutique firms giving the personal attention that you want. Is there a firm that can give you what you need and what you want at the same time? We believe that ChapmanCraig is that firm, giving its clients the best of both worlds.

Since 1995, ChapmanCraig has been offering its special brand of wealth management to high-net-worth individuals and families across Asia, giving them access to global investment resources with personalized investment advice. We are an independent, employee-owned wealth management firm licensed and regulated by the Securities and Futures Commission of Hong Kong.

The financial capabilities of our partners and the personal attention of our Hong Kong wealth managers can help you protect and grow your wealth with confidence.

We offer global investing with a local personality.

为美好未来 共同努力

亚洲有许多公司为像你这样的投资者提供金融服务。有国际巨头，拥有你需要的全球网络和资源；也有小规模公司可以给您想要的个人的关注。但是否有一家公司，能够同时满足你的需要和意愿？我们相信ChapmanCraig 正是这样的公司。

自1995年以来，ChapmanCraig 公司一直为亚洲众多高净值资产人士和富裕家庭提供独特的财富管理服务，使他们获得全球性的投资资源和个性化的投资建议。我们是一家独立的，员工拥有的财富管理公司，持有香港证监会牌照并由其监管。

我们的合作夥伴具备丰富的财富管理经验，配合我们在香港的财富管理经理，专注您的个人需要，可以帮助您达到财富保值和资产增长。

AN INVESTMENT STRATEGY TAILORED JUST FOR YOU

There is more to investing than just numbers. ChapmanCraig takes investing to a personal level by working closely with clients to assess their financial situation and wealth objectives. After all, no two people are ever the same and neither should be their future.

Investment accounts are primarily segregated portfolios, but may include a pooled fund. All portfolios are invested in a similar fashion by the same investment team, benefitting from analysis by the in-house industry experts and outstanding portfolio managers at LBA.

Each investment portfolio is part of a wealth management plan that focuses on long-term capital appreciation and the income needs of that individual. We do not take risks with your hard-earned money by using leverage or investing in complex structured instruments.

We collaborate with your outside advisors in providing seamless execution on matters such as trust administration, pension or retirement plans, cash movements and financing arrangements. Our experienced client services team takes the administrative burden away from our clients, providing assistance with compliance paperwork, consolidated reviews of all assets and tax reporting, when asked.

个性化投资 专属于您

投资并不是简单的数字游戏。每个投资者都是独一无二的，他们对未来有不同的梦想和目标。因此ChapmanCraig与每个客户紧密联系，深入分析了解他们的财务状况和投资目标，在此基础上为客户提供个人化的财富管理服务。

我们的投资账户主要是独立投资组合，但也可能是合并基金。所有投资组合由LBA内部行业专家团队分析及优秀的投资经理主管。

每个投资组合是财富管理计划的一部分，我们把重点放在资本长期增值和每个人的收入需求。我们不会采用杠杆或把您辛苦赚来的钱投资在复杂的高风险结构性工具。

我们与客户的顾问合作，为他们的信托管理，退休计划，现金流动和融资安排等问题提供无缝执行。我们经验丰富的客户服务团队协助客户处理 合规文件，减少他们的行政负担；在客户有需要时，为他们提供所有资产的综合分析和税务报告。

THE RIGHT TOOLS FOR THE RIGHT JOB

When you invest with ChapmanCraig, you are getting more than just conventional investment advice. The services we provide differentiate us from other investment advisors in Asia, allowing us to develop a trusting and profitable partnership with our clients.

We work very closely with our clients to develop, and continuously review detailed investment and retirement plans, addressing long-term goals, immediate or periodic cash requirements and any gaps in existing financial plans.

Our clients have access to senior managers of the firm at any time, ensuring that they receive advice based on a thorough understanding of their changing life circumstances.

Clients also benefit from the expertise of top-tier portfolio manager, Letko, Brosseau & Associates Inc, to generate strong long-term financial returns.

Our clients have a clear understanding of every action we take with their money thanks to the transparency provided by monthly statements from world-class custodian banks.

We have a large network of leading professional advisors. From leading tax and estate planning, to accounting and legal specialists, we can assist our clients to find expert advice on whatever issue they face, giving them a 360° wealth management plan.

选择适当工具 才能事半功倍

当你透过 ChapmanCraig 投资时，你得到的不仅是传统的投资建议。我们提供的服务跟亚洲其他投资顾问不同，我们致力与客户建立相互信任，互惠互利的合作夥伴关系。

我们与客户密切联络，制定并且不断审查详细的投资和退休计划，填补其现有财务计划的缺漏，协助他们解决即时或周期性的现金需求，并达到他们的长远目标。

客户可以随时与本公司的管理层沟通，确保我们清楚了解他们最新的财务状况，并在这基础上提出合理的建议。

我们与世界顶级的资产管理公司Letko, Brosseau & Associates Inc. (LBA)合作，为客户提供稳定的长期投资回报。

客户资产由世界级保管银行托管，他们提供每月报表，让客户清楚地了解资金的运作，透明度高。

ChapmanCraig 拥有庞大的专业顾问网络，客户在面临任何税务、遗产规划、会计和法律问题时，我们都可以协助寻求专家意见，给他们一个全面的财富管理服务。

BRINGING THE BEST TOGETHER

When ChapmanCraig was established in 1995, we wanted to bring to Hong Kong and the region a level of investing knowledge and personal service not being experienced by local investors.

We have entrusted Letko, Brosseau & Associates Inc ("LBA"), RBC and ScotiaTrust to help us provide the solid investment performance and transparency our clients want.

Relying on our modern, secure and purpose-built systems, we collaborate with our service providers to ensure compliance, clear communication and accurate reporting.

We are dedicated to providing our clients with security, service and compliance.

Letko, Brosseau & Associates Inc. (Portfolio Manager)

With over US$24billion in assets under management, Montreal-based LBA has given ChapmanCraig clients outstanding performance, consistently beating their benchmarks for over 20 years. LBA is registered with all ten provincial securities commissions in Canada, and a wholly-owned subsidiary of LBA is registered with the Securities and Exchange Commission in the United States.

RBC Investor & Treasury Services and ScotiaTrust (Custody banks)

Both the Royal Bank of Canada and ScotaTrust are licensed commercial banks supervised by the Canadian banking regulator. They each have over US$500 billion of assets. As custodians for our clients' funds and securities, these banks give our operations the transparency and security necessary to ensure a trusting relationship with our clients.

Our clients receive complete account and transaction reports each month, both from us and directly from their custodian banks, providing multiple layers of safety and transparency.

汇集群英 提供最佳服务

卓文财富管理有限公司自1995年成立伊始，始终致力于通过我们专业知识和服务带给香港及亚太地区投资者与众不同的投资体验。

我们委托Letko, Brosseau & Associates Inc. (LBA)、RBC 及 ScotiaTrust 帮助我们取得稳定的投资回报和实现投资服务的透明度。

我们与服务提供商合作，利用现代化、安全和专用的系统，确保合规性，沟通和准确的报告。

Letko, Brosseau & Associates Inc. (投资管理公司)

LBA的总部位于加拿大蒙特利尔，目前管理的资产超过240亿美元。LBA一直为卓文的客户提供稳定出色的投资回报，过去20年的回报一直高于业绩基准。LBA是加拿大全部十个省府的证监委员会的注册成员，其全资子公司 Letko Brosseau Investment Management Inc. 是美国证券交易委员会的注册成员。

RBC 及 ScotiaTrust (托管银行)

RBC 及 ScotiaTrust均为拥有一级资质的商业银行，在加拿大的银行监管部门注册并受其监督，旗下管理资产均超过5000亿美元。作为卓文客户资金及证券的托管银行，他们保证了我们运作的透明度及安全性，帮助我们与客户建立坚实的互信关系。

我们和托管银行每个月都会分别寄出账户与交易情况对账单，让客户更清楚了解账户状况。

AT THE HELM

Being a client of ChapmanCraig gives you unconditional access to the firm's senior managers, Craig Chapman and Douglas Fletcher. They have a combined total experience of over fifty years in the financial industry and have worked in various cities around the world, which broadened their perspective on global markets. When you invest with ChapmanCraig, you are investing into some of the best and most globally experienced wealth managers driving investment decisions in Asia.

Craig Chapman – Managing Director

With a BA in Economics from McGill University, Craig joined Canadian investment firm Wood Gundy in 1986 and by 1988 headed the European institutional equity sales team in Paris. He joined Salomon Brothers (SB) New York in 1992 before moving to Hong Kong in 1993 to join SB's private and institutional asset management business in Southeast Asia. Craig is a trustee of the Hong Kong Outward Bound Trust.

Douglas Fletcher – Managing Director

Doug has law degrees from Osgoode Hall Law School (LL.B) and New York University (LL.M, Tax), a BA (Hon) in Economics from Simon Fraser University and an MBA from York University, Toronto.

Prior to joining ChapmanCraig, Doug worked in the investment banking department of Salomon Smith Barney / Citigroup (SSB), beginning in its New York office in 1997. He then became a Director in SSB's Singapore and Sydney offices. Before joining SSB, Doug worked for five years in Nesbitt Burns' investment banking group.



Craig Chapman
Managing Director
董事总经理



Douglas Fletcher
Managing Director
董事总经理

公司管理层

作为卓文的客户，您可以随时联系公司的管理层Craig Chapman及Douglas Fletcher先生。他们在金融行业合计拥有超过50年经验，在多个国际都市的工作经历，更赋予他们广阔的国际化视野。当您与卓文携手合作时，我们经验丰富的跨国财富管理团队，将帮您做出最佳的投资决策。

Craig Chapman — 董事总经理

Craig 拥有麦吉尔大学(McGill University)的经济学学士学位，于1986年加入加拿大的Wood Gundy 投资公司，并于1988年带领销售团队负责法国巴黎的机构客户。他于1992年在纽约加入索罗门兄弟(Saloman Brothers)，1993年派驻香港，加入索罗门兄弟东南亚地区的个人和机构客户资产管理部门。他也是香港外展信托机构的受托人。

Douglas Fletcher — 董事总经理

Douglas 拥有加拿大Osgoode Hall Law School 的法学学士 (LL.B) 及纽约大学 (New York University) 的法学硕士学位 (LL.M, Tax)、西蒙菲莎大学(Simon Fraser University) 经济学学士学位，以及多伦多约克大学 (York University) 的工商管理硕士学位。

在加入卓文之前，Douglas 曾在 Nesbitt Burns 的投资银行部门任职五年。从1997年开始，Douglas 任职于 Salomon Smith Barney / Citigroup (SSB) 位于纽约的投资银行部门，随后担任SSB新加坡和悉尼公司的董事。

WHAT CLIENTS SAY

"After a run of bad investments, I started working with ChapmanCraig Limited in 2000. They have helped restore my confidence in the financial markets and take the strains and worries out of long-term financial planning. Their practical advice and sound investment strategy have turned me from a "deer in the head lights" to a confident investor. During the 16 years I have been working with ChapmanCraig Limited, they have assisted me in thinking about the key issues I need to address for my long-term financial security and have steadily grown my capital to provide that security. With their regular reporting and independent custody arrangements, I am comfortable my assets are in good hands and their strategic investment approach has paid off even in times of market volatility and uncertainty."

- Partner, Leading Global Law Firm

"I have been a client of ChapmanCraig Ltd for 11 years now. Throughout that time, they have provided reliable and realistic advice, in line with their relatively conservative mandate, which has provided reassurance on the preservation of assets during times of turmoil and the comfort that reasonable returns can be achieved during periods of recovery."

- Partner, Hong Kong Top-tier Law Firm (Retired)

"I retired from corporate life at 49 years of age to enjoy more fully the fruits of my labours. Investment banks managing my portfolio disappointed me and ChapmanCraig was recommended by a happy client. They've been conservatively managing my investment portfolio since 2004, leaving us free to pursue a life of snow skiing, sailing, cruising, philanthropy and touring the world while enjoying residences in two countries. ChapmanCraig represents for me, financial freedom."

- Partner, Advertising (Retired)

客户的心声

在经过一连串糟透了的投资后，我自2000年开始与 ChapmanCraig 有限公司合作。他们使我恢复对金融市场的信心，同时减轻了长远财务策划的压力和担忧。他们通过实际的建议和良好的投资策略使我释除焦虑,恐慌和混乱，变成一个充满自信的投资者。在跟 ChapmanCraig 合作的16年里，他们协助我思考解决有关长远财务安全的问题，令我的资本稳步增长达到财务安全。通过定期报告和独立托管安排，我安心知道我的资产受到妥善管理，即使在市场波动和不确定性的情况下，他们的战略投资方法也得到了回报。

- 国际顶级律师事务所合夥人

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我成为 ChapmanCraig 公司的客户已经十一年了。在过去这段日子里，他们提供了可靠和实际的建议，切合他们相对较保守的公司方针，不仅在市场大动荡时令我安心知道资产得到保护，而且在市况恢复期间也得到合理的回报。

- 香港顶级律师事务所合夥人 (已退休)

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我49岁退休，打算更充分地享受我半生在企业辛劳工作的成果。以往一些投资银行为我管理的投资组合结果令我失望。其后 ChapmanCraig 其中一个客户满意地向我推荐他们的服务。他们自2004年以来一直以保守的原则管理我的投资组合，让我和家人有更多自由时间玩滑雪，帆船，乘游轮，参与慈善事业和环游世界，同时在两个国家拥有住宅物业。对我来说，ChapmanCraig 代表著财政自由。

- 知名广告公司合夥人 (已退休)

CONTACT US

If you are looking for a professional wealth manager who can grow your wealth with the global resources of a large investment firm while protecting your interests like a close partner, then ChapmanCraig is the one.

For more information, speak with us anytime on how we could help protect and grow your wealth with confidence.

Hong Kong
Suite 2507, Lippo Centre Tower Two
89 Queensway, Hong Kong
Tel : +852 2521 7218
Fax: +852 2521 2626

E-mail
info@ChapmanCraig.com

Website
www.ChapmanCraig.com

联系我们

如果您正在寻找一家既拥有大型投资公司的全球资源，又能像紧密伙伴保障您利益的专业化的财富管理公司，那么卓文财富管理有限公司将是您的最佳选择。

欲了解有关财富保值与增值的更多信息，请随时与我们联系。

香港
金钟道89号力宝中心2座2507室
电话：+852 2521 7218
传真：+852 2521 2626

电邮
info@ChapmanCraig.com

纲址
www.ChapmanCraig.com

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