



BLG VANCOUVER GLOBAL WEALTH MANAGEMENT AND STRUCTURING TEAM

**博历维律师事务所温哥华分所
全球财富管理与建构专业团队**

GLOBAL WEALTH MANAGEMENT AND STRUCTURING SERVICES

全球财富管理与建构服务

Clients turn to Borden Ladner Gervais LLP (BLG) for our expertise in multi-generational asset preservation and estate planning for high-net-worth families. With years of experience advising families in Asia, North and South America, Middle East and Europe, our Vancouver Global Wealth Management and Structuring Team offers comprehensive and flexible solutions to serve clients effectively in their personal circumstances.

博历维律师事务所具备为高净值资产客户提供世代资产保存与规划服务的专业知识和经验, 凭着多年来为亚洲、美洲、中东、欧洲各地许多客户提供此服务的经验, 温哥华的全球财富管理与建构团队能根据客户的具体情况与需要, 为客户量身定做完善而灵活的解决方案。

BLG's Family Wealth Counsel Focus Group provides insight and assistance to high net worth and ultra-high net worth Canadian and international families for their asset protection, estate, tax minimization and family governance planning needs.

BLG Vancouver's Global Wealth Management and Structuring Team offers, as part of the Family Wealth Counsel Focus Group, a full range of domestic and international planning, tax advisory, asset protection and family governance services which serve and meet the needs of those individuals and families who are tax resident in Canada and those individuals and families who are tax resident abroad in terms of holistic global estate planning.

博历维家族财富核心顾问团队为加拿大和国际高净值资产和超高净值资产家族的资产保护、遗产、税收减免和家族管治等提供独到的建议及协助, 以满足他们的需要。

作为家族财富核心顾问团队的一部分, 博历维温哥华全球财富管理与建构专业团队为客户提供本地和全球的规划、税务咨询、资产保护和家族管治等全套服务, 满足加拿大税务居民(个人和家族)以及非加拿大税务居民在全球资产整体规划上的需要。



With a holistic approach to global estate planning, our approach is twofold:

- first, the Team focuses on establishing an **asset protection structure** in which protective measures are established to grow and preserve the family's material wealth; and
- secondly, looks at creating a **family governance structure** in which operational measures are carefully crafted with the aim of looking after the human capital of the family and protecting the family as an organic whole, instilling family unity and allowing values and traditions to take root.

Our Team will work with you to ensure that the family remains coherent to enable the family assets to be enjoyed across generations and that you and your family will benefit the following by way of a holistic approach to global estate planning:

- allowing you to manage and distribute the assets in accordance with your wishes
- protecting the assets from claims of existing and future potential creditors, for example, a spouse seeking a divorce, ex-spouse, children's spouses or children's creditors, etc.
- mitigating tax liabilities in respect of the income taxes, capital gains taxes and inheritance taxes of any jurisdiction that may be imposed
- mitigating the interference on the assets from political risk, economic risk, expropriation, and imposition of exchange control
- mitigating frictions and legal disputes arising out of the distribution of the assets within the family

BLG's Global Wealth Management and Structuring Team looks forward to assisting you in designing and implementing an appropriate holistic global estate planning which is custom-tailored to your particular circumstances and long term objectives.

本所采取整体规划全球资产的策略，主要包含以下两方面：

- 首先，为客户建立一套**资产保护架构**，用以保存家族资产并使其持续增值
- 其次，协助客户建立一套**家族治理架构**，透过此精心设计的架构的运作维系家族成员关系，使家族成为紧密的有机体，进而促进家族团结，延续家族的传统与价值观

本所致力于协助您凝聚家族共识以确保家族资产顺利世代传承，并确保您以及家族成员通过整体性全球资产规划获得如下收益：

- 按照您的期望进行家族资产的管理与分配
- 避免家族资产受到现在与未来潜在债权人的追索，例如提出离婚的配偶、前配偶、子女配偶、子女的债权人等等
- 减少在不同辖区所可能涉及的所得税、资本增值税以及遗产税等税赋的负担
- 降低资产受到政治风险、经济风险、政府征收以及外汇管制等因素的干扰
- 减少家族成员间因资产分配产生磨擦与法律纠纷

本所全球财富管理与建构专业团队期待有机会针对您个人的情况与愿望为您规划执行一套量身定做的、完备且符合长期目标的整体性全球资产规划。

OUR TEAM MEMBERS

团队成员



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Otto-Hans (Hans) Nowak is a Senior Counsel in the Vancouver office of BLG. Mr. Nowak has a global wealth management and wealth transfer planning practice, with emphasis on holistic global estate planning. He also practises in the areas of domestic tax planning, international tax planning and international wealth transfer, estate and asset preservation planning. Mr. Nowak has been practising Canadian law for more than 35 years including in Hong Kong from 1989 to 1993 and continues to travel extensively to Southeast Asia, China, Germany, Switzerland, Liechtenstein, Brazil, Europe, South America and the Middle East to advise or meet with clients and prospective clients, including financial institutions, professional advisors and their clients, on international wealth transfer and structuring issues and Canadian tax law.

Prior to migrating from Germany to Canada in 1971, Mr. Nowak was a captain (Hauptmann) and F-104 Starfighter pilot in the West German Air Force. He is fluent in both German and English, and conversational in Italian.

卢汉思律师是博历维律师事务所温哥华分所的高级法律顾问。卢律师的专业领域为全球财富管理与资产转移，其在整体性全球财富规划方面尤为擅长，卢律师同时也执业于加国与国际税务规划、国际资产转移、遗产及资产保存规划等领域。卢汉思律师在加拿大执业超过35年，其中包括1989年至1993年期间在香港工作，目前仍不时往来东南亚、中国、德国、瑞士、列支敦斯登、巴西、欧洲、南美洲、中东地区为各地客户，包括金融机构、专业顾问及其客户等提供国际财富规划以及加拿大税法等方面的法律咨询与服务。

在1971年移民加拿大之前，卢汉思律师曾是西德空军F-104 Starfighter战斗机的指挥官和飞行员，他英语和德语流利，也会说意大利语。



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Peter Wong is a partner in the Tax Group in the Vancouver office of BLG. His practice is focused on matters involving Canadian tax issues, and he typically advises clients on the Canadian income tax aspects of estate planning, wealth management, corporate reorganizations, and investments in Canadian real estate or businesses. He has assisted clients in resolving disputes with the Canada Revenue Agency and has worked with taxpayers wishing to make a voluntary disclosure.

Mr. Wong is fluent in English and Cantonese and he has advised Cantonese-speaking clients from Hong Kong and certain parts of China.

黄子强律师是博历维律师事务所温哥华分所税务组的合伙律师。黄律师专精于加拿大税法领域，特别擅长由加拿大所得税法方面提供客户有关资产规划、财富管理、公司重组、以及在加拿大进行房地产与商业投资等各方面的法律咨询与服务。黄律师已成功协助许多客户解决与加拿大税务局的税务纠纷或进行自愿性披露。

黄子强律师能持流利的英语和粤语，其客户群包括许多来自香港与中国部分地区以粤语为主要语言的客户。



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Wei Kang practices in the area of wealth management, corporate commercial, and banking regulatory laws.

Wei advises high-net-worth families on international estate and asset protection planning, the use of tax-efficient structures for investment into Canada and the development of family governance structures to facilitate the succession of wealth from generation to generation. She designs appropriate asset protection plans for high-net-worth clients and works with professional advisors in various jurisdictions to implement as well as assist in the administration of such plans. Wei has experience in a variety of corporate transactions including the mergers and acquisitions of private corporations, corporate reorganizations and estate planning transactions. Her practice is global in nature and she collaborates with counsels in foreign jurisdictions to address cross-border issues, international wealth transfer issues and financial regulatory compliance issues in connection with the transfer of assets into asset protection structures as well as any subsequent investment made by asset protection structures.

Wei also provides legal compliance advice, risk analysis and corporate advice to financial institutions, including having completed a secondment to a financial institution in 2014. Wei has completed the Canadian Institute of Chartered Accountants' In-Depth Tax Course Parts I and II.

Wei speaks, reads and writes Mandarin Chinese, and converses in Taiwanese.

康唯律师的执业领域为财富管理、公司法、商法和银行监管法。

康律师为高净值资产家庭提供的法律服务包括国际资产保护计划, 为投资加拿大设立税务优化的架构, 以及为家族的财富传承设立治理架构。康律师为高净值资产家族量身定做资产保护计划, 与各司法管辖区的专业人士合作实施计划并协助管理资产保护架构。康律师在私营企业并购、公司重组及遗产规划相关交易等商业领域积累了丰富的经验。康律师的执业是国际性的, 通过和国外司法管辖区的律师合作, 处理与资产转入资产保护架构和架构日后的投资所涉及的跨境交易、国际资产转移及金融合规等事务。

康律师还为金融机构提供合规、风险评估及公司法方面的法律服务, 2014年曾外派到某金融机构工作过一段时间。

康律师已完成加拿大特许会计师协会深度税务的第I和第II部分课程。

康律师中英文均十分流利, 能说闽南语。



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Stella Guo is a consultant in the Tax Group in our Vancouver office. She focuses on providing consulting services for investment from China into Canada and asset protection for high net worth Chinese families.

Before joining BLG, Ms. Guo worked for the British Petroleum p.l.c. (BP) as Regional Legal Advisor in Asia Pacific, Legal Manager in Southern China and Regional Director of BP's manufacture and business development of solar products in Greater China. Ms. Guo has also acted as director on board of two clean energy technology companies in Canada.

Ms. Guo's expertise is in the energy sector, including wind, solar, oil, gas and chemicals and in the practice areas of mergers and acquisitions, corporate and commercial, international trade and compliance. Ms. Guo is fluent in English, Mandarin, Cantonese and Chaozhou Dialect. She has worked and lived in Guangzhou, Shanghai, Hong Kong, Melbourne and Vancouver and is experienced in handling legal and commercial transactions involving multi cultures and multi languages.

郭务光是温哥华分所税务组的顾问，她的工作重点在为中国人到加拿大投资及高净值资产中国家庭的资产保护提供咨询。

在加入博历维律师所之前，郭女士是英国石油公司（BP）亚太区的法律顾问，南中国法律主管和太阳能中国业务的负责人，还曾担任过加拿大两个清洁能源技术公司的董事。

郭女士的经验主要集中在能源行业，在风能、太阳能、石油、天然气和化工的项目开发、企业营运、国际贸易、并购和合规方面积累了丰富的经验，她曾经在广州、上海、香港、墨尔本等地工作过，中英文流利，会讲粤语和潮州话，擅长处理多文化、多语言的跨国法务和商务问题。



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Sean Muggah is a partner in our Corporate Commercial Group, and a member of our Japan and Korea Focus Groups. Sean represents and advises clients on a wide range of corporate and commercial matters, and has extensive experience with mergers & acquisitions, disposition and acquisition of businesses on behalf of Canadian, US and international companies, cross-border transactions, corporate reorganizations, joint ventures and partnership agreements in a wide variety of industries, including professional services such as engineering and computer services.

Sean's practice spans a variety of sectors, including infrastructure and energy projects, and power and electricity. He advises financial institutions on regulatory and other corporate/commercial matters, and has extensive experience advising clients in the education and not-for-profit sectors.

From 2000 to 2003, Sean was foreign counsel with the law firm of Nishimura & Partners (now Nishimura & Asahi) in Tokyo, Japan, where his practice focused on cross-border commercial transactions.

马格律师是博历维律师事务所商务组的合伙律师，同时为日本与韩国业务团队的成员。马格律师为客户提供商业及公司事务多方面的法律咨询，积累了为加拿大、美国与跨国企业进行并购、产权处置与收购事宜、跨国交易、公司重组、合资企业和合伙协议的丰富经验，涉及广泛的行业，包括工程与计算机科学服务等。

马格律师的执业领域宽广，包括基础设施、能源项目、电力和电气。他为金融机构提供监管及其他公司法与商法相关的咨询，并拥有为教育与非盈利机构提供法律服务的丰富经验。

2000到2003年，马格律师担任日本东京西村综合法律事务所（现为西村朝日法律事务所）的外国顾问，执业重点为跨国商务交易。

ABOUT BLG

博历维律师事务所

Borden Ladner Gervais LLP (BLG) is a leading, national, full-service Canadian law firm focusing on business law, commercial litigation and arbitration, and intellectual property solutions for our clients. BLG is the country's largest law firm with more than 700 lawyers, intellectual property agents and other professionals in five cities across Canada. We assist clients with their legal needs, from major litigation to financing and patent registration. For further information, visit blg.com

Understanding your needs as a High Net Worth /Ultra High Net Worth family and how legal changes affect you and your family is BLG's business. We believe that nothing less than achieving results through excellence will do. This commitment to service has resulted in the frequent recognition of many of BLG's legal professionals at home and abroad. The Firm is featured consistently in various national and international legal publications, including *Best Lawyers in Canada*[®], *Chambers Global – The World's Leading Lawyers for Business*, and *The Lexpert*[®]/*American Lawyer Guide to the Leading 500 Lawyers in Canada*. BLG's Family Wealth Counsel Focus Group or its members are recognized in *The Best Lawyers in Canada*[®] 2016 and *The 2015 Canadian Legal Lexpert*[®] Directory.

博历维律师事务所（博历维）是一所提供全方位服务的加拿大知名律师事务所，主要业务涵盖商事法、商务诉讼和仲裁、知识产权解决方案等领域。博历维是加拿大最大的律师事务所，在加拿大设有五个分所，拥有超过700名律师、知识产权代理人及其他专业人员。根据客户的要求，我们提供从重大诉讼到融资和专利注册各种法律服务。有关博历维的更多资讯，详见blg.com 网站。

我们理解高净值资产和超高净值资产家族的需求以及法律上的变更对您的影响，我们相信以最好的服务达到最佳的效果，因为我们对服务的承诺，许多博历维的专业人士在国内外经常得到认可，国内国际上多种法律刊物一再推荐本所，包括《加拿大最佳律师》，《环球钱伯斯-世界领先商务律师》和《法律专家库-美国律师指引-加拿大律师500强》。博历维家族财富核心顾问团队及其成员入选《2016年加拿大最佳律师》及《2015年加拿大法律专家库》。

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