



Rise2040 – Future of Finance and Accounting

For nearly three decades, our profession has come together at pivotal moments to define its future — from the CPA Vision Project to CPA Horizons 2025 and the combined forces of the AICPA and CIMA in Rebooting Business: Valuing the Human Dimension. Each effort reflected the realities of its time and helped guide us forward.

Today, we stand at another defining moment at the dawn of the age of artificial intelligence (AI).

Rise2040: Shaping the Future of Finance and Accounting is not a final answer. This initiative is a starting point, an ongoing, global process and platform designed to help us collectively explore, challenge, and shape what comes next for the profession.

Through Future Forums held across 25 countries and engaging more than 6,000 professionals, we have begun to gather a rich and diverse set of perspectives. These insights are being used to inform strategic discussions at the AICPA and CIMA, including our board priorities, future investments, and how we support members, firms, and organizations around the world.

Importantly, this work is not about predicting a single future with certainty. The year 2040 is not a fixed destination; it is a mechanism to help us look beyond the immediate horizon and think more expansively about the forces shaping our profession. There are, of course, unknowns and uncertainties ahead. But there are also clear signals — what futurist Daniel Burrus calls “Hard Trends” — that give us greater confidence about where change is heading and where opportunity lies.

What distinguishes Rise2040 is how we are approaching this work together.

Hong Kong Office

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Many organizations have produced valuable reports that describe the future of the profession and help their members prepare for change. Rise2040 builds on that tradition but takes an important step further. It is designed not only to describe the future, but to equip our profession to actively shape it through global co-creation, structured foresight, and an AI-enabled platform to capture a growing body of shared insights that will continue to evolve over time.

RISE2040 Vision Report:

<https://insights.cgma.org/story/rise2040-shaping-the-future-of-finance-and-accounting/page/1>

To find out more about the Rise2040 Vision Report and beyond, please register for this CIMA Conference, see you soon.

Date: 17 August 2026 (Monday)
Time: 2:30pm - 5:15pm
Theme: Rise2040 – Future of Finance and Accounting
Venue: CUSCS Centre Lecture Theatre, Room A, 1/F, Bank of America Tower, 12 Harcourt Road, Central, Hong Kong

2:00pm – 2:30pm	Registration
2:30pm - 2:35pm	Welcome Speech from CIMA Mr. Louis Lin, FCMA, CGMA, Chairman of CIMA Hong Kong SAR Area Committee 2026-27, Chartered Institute of Management Accountants
2:35pm – 2:40pm	Welcome Speech from CUHK Professor Yong George Yang, Professor and Director of the School of Accountancy, The Chinese University of Hong Kong
2:40pm - 3:10pm	Speech and Presentation Rise2040 - Shaping the Future of Finance and Accounting Rise2040 does not prescribe a single road map. It reflects the dominant signals, recurring concerns, and shared aspirations voiced across the global conversations. The dataset revealed five distinct, non-overlapping drivers shaping the profession's future. These drivers are grounded in Hard Trends — future facts that will occur — and Soft Trends — areas influenced by choice. - Technology and data infrastructure - Value model transformation - Talent and workforce dynamics - Regulatory and trust architecture - Market and societal expectations

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	This presentation will give a quick overview of the insights in the Rise2040 Vision Report. - Mr. Will Hutchinson, FCMA, CGMA, Director of Finance IT & Legal, Sainsbury's Argos Asia
3:10pm – 3:40pm	Speech and Presentation As AI revolutionizes how information is processed and used, accounting sits at the intersection of data, technology, and decision-making. This talk explores the connections between accounting, mathematics, engineering, and information science, offering fresh perspectives on how organizations, investors, and society can make sense of an increasingly complex and AI-powered world. - Professor Yong George Yang, Professor and Director of the School of Accountancy, The Chinese University of Hong Kong
3:40pm – 4:10pm	Fireside Chat The fireside chat will deep dive into AI, digital innovation, business models and operation efficiency. What is the talent strategy under this new technological and business environment in insurance and healthcare industry. - Mr. Johnny Li, ACMA, CGMA, MMB Asia Digital Leader, Mercer Marsh Benefits Moderator: - Mr. Sam Yee, FCMA, CGMA, Committee Member, CIMA Hong Kong SAR Area Committee 2026-28
4:10pm – 4:20pm	Break
4:20pm – 5:10pm	Panel Discussion The road to 2040: From vision to action. The distinguished panellists will discuss the best practices and insights in their organisations and industries about technology, AI, value models, talent and workforce, trust, and market & societal expectations, for Hong Kong and beyond. - Ms. Joey Chung, Group Head of Human Resources, Haitong International Securities Group - Mr. Mark Clayton, FCMA, CGMA, Group CFO, C2W Group - Mr. Edmond Lau, FCMA, CGMA, CFO, Cyberport - Mr. Simon Suen, FCMA, CGMA - Ms. Yan Zhang, CFO, Hilti Greater China

	Moderator: - Mr. Stephen Walsh, FCMA, CGMA, Director, Managed Services, KPMG
5:10pm – 5:15pm	Closing Speech - Mr. Louis Lin, FCMA, CGMA, Chairman, CIMA Hong Kong SAR Area Committee 2026-27, Chartered Institute of Management Accountants

Speakers (in speech order)

Welcome Speech by CIMA



Mr. Louis Lin, FCMA, CGMA
Chairman, CIMA Hong Kong SAR Area Committee 2026-27
Chartered Institute of Management Accountants

Louis Lin is the Chair of CIMA Hong Kong SAR Area Committee and has been working in the art auction industry for more than a decade. He is currently Vice President, Finance Manager of Christie's Asia, looking after the company's financial operations and has experience in system upgrade and integration, blockchain transaction and M&A. He is holder of BBA from Chinese University of Hong Kong and Master of Corporate Governance ("MCG") from the Hong Kong Polytechnic University.

Welcome Speech by CUHK



Professor Yong George Yang
Professor and Director of the School of Accountancy
The Chinese University of Hong Kong

Professor Yong George Yang is a Full Professor and Director of the School of Accountancy at The Chinese University of Hong Kong. He received his Bachelor's degree in Financial Management and Master's degree in Macroeconomics from Peking University, and his Ph.D. from Northwestern University. His research focuses on information disclosure, corporate governance, corporate social responsibility, and financial intermediaries. His work has been published in leading academic journals, including The

Accounting Review, Management Science, and Review of Accounting Studies. His contributions to accounting research have been widely recognized. In 2022, he received the Distinguished Contributions to Accounting Literature Award from the American Accounting Association, one of the discipline's most prestigious honors. He holds independent directorships at several publicly listed companies and serves on various advisory panels of the Hong Kong Government.

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Speech and Presentation



Mr. Will Hutchinson, FCMA, CGMA
Director of Finance IT & Legal, Sainsbury's Argos Asia
Committee Member, CIMA Hong Kong SAR Area Committee 2026-28

Will Hutchinson is a CIMA qualified accountant with over 20 years' experience in FMCG and Retail. He started his career in the UK with the Campbell Soup Company, where he gained a thorough grounding in management accounting fundamentals. Will then joined Tesco, one of the world's leading retailers, completing his CIMA qualification and progressing through a variety of roles in the UK and China over 16 years.

Will is currently Director of Finance, IT & Legal for Sainsbury's Argos Asia, based in Hong Kong and with operations in mainland China, Bangladesh and India.

Will holds MSc and MA (Cantab) degrees from the University of Cambridge and has lived in Hong Kong with his family since 2016.

Fireside Chat



Mr. Johnny Li, ACMA, CGMA
MMB Asia Digital Leader, Mercer Marsh Benefits
Committee Member, CIMA Hong Kong SAR Area Committee 2026-28

BSc Economics, London School of Economics
MSc Financial Economics, Saïd Business School, University of Oxford
Associate Chartered Management Accountant (ACMA) | AICPA & CIMA
Chartered Global Management Accountant (CGMA) | AICPA & CIMA

Johnny is the MMB Asia Digital Leader with 10 years' experience in the insurance broking industry, developing and executing digital and AI strategies that align with our business objectives.

Prior to his current role, he was the North Asia Operations & Technology leader specialising in driving operational efficiency, client-centric service delivery and digital portal adoptions.

He has experience in the insurance and healthcare industry in driving digital innovation and embedding client-centric offering in B2B and B2B2E digital portals, curating best-in-class digital experience for our clients in MMB Asia.

Johnny also has experience in the e-commerce and analytics industry before joining Jardine Lloyd Thompson (JLT) in 2014, which was subsequently acquired by Marsh McLennan in 2019.

Moderator



Mr. Sam Yee, FCMA, CGMA
Committee Member, CIMA Hong Kong SAR Area Committee 2026-28

Sam has a proven track record in establishing corporate functions, leading transformation programs, defining risk and finance strategies, and implementing compliance frameworks aligned with regulatory requirements and industry best practices. A dynamic leader, he excels in building and mentoring high-performing teams across risk, finance, compliance, operations, and technology, fostering a collaborative, innovation-driven culture to ensure strategic execution and regulatory excellence.

His multidisciplinary expertise spans Telco, Fintech, SVF, banking, money lending, e-commerce, loyalty platforms, and emerging digital ecosystems, such as Web3.0, and stablecoin issuance sandboxes. He holds multiple master's degrees in law, statistics, and accountancy, complemented by prestigious professional qualifications (FCMA, CGMA), reinforcing his leadership in navigating complex financial and regulatory landscapes. He is also pursuing a PhD in Enterprise Management at the Shanghai University of Finance and Economics, China, with a research focus on the impact of Artificial Intelligence (AI) on Corporate Governance, Financial Management, Risk Management & Internal Control, Compliance and ESG.

Beyond his corporate achievements, Sam is deeply committed to community engagement and mentorship, serving as a speaker in various events to share the market insights, mentor in the "Strive and Rise Programme" to help teens broaden their horizons, build confidence, and set future goals. Through charitable contributions, social outreach, and knowledge-sharing initiatives, he fosters a positive outlook on life and giving back to society.

Panel Discussion



Ms. Joey Chung
Group Head of Human Resources,
Haitong International Securities Group
Fellow Member of the Hong Kong Institute of Human Resource
Management (HKIHRM)

Joey Chung is a seasoned HR professional with over 20 years of experience. Her expertise spans the planning, development, and implementation of a wide range of HR initiatives, including human capital solutions, reward and performance management systems, and staff development programs. As Haitong International's Group Head of Human Resources, she oversees human resources and learning and development strategies for the organization's global operations.

Joey is a graduate of The Chinese University of Hong Kong and a Fellow Member of the Hong Kong Institute of Human Resource Management (HKIHRM). She also holds several prestigious HR qualifications, including the SHRM-SCP, Chartered Fellow of the CIPD, and the Chartered Professional in Human Resources designation from British Columbia and Yukon. In addition, she is a Governance Professional with both FCG and HKFCG.

Joey is frequently invited to speak at conferences and industry events. She makes significant contributions to the HR community, serving as a judge and organising committee member for various award programmes. Since 2024, she has served on the Organising Committee for the HKIHRM Excellence Awards and has also contributed as a speaker for various HKIHRM webinars.

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Mr. Mark Clayton, FCMA, CGMA
Group CFO, C2W Group
Chairman, British Chamber of Commerce South China

Mark Clayton is a multi-award-winning finance professional and visionary leader with over 20 years of experience in finance, leadership, and business development.

He is CFO and Co-Founder of C2W a British Manufacturing group based in South China. C2W Group, founded in 2005 has a factory, supply chain centre, and R&D centre in China and sourcing offices around China, India, Vietnam, and Thailand.

Mark, who moved to China in 2005, is also a committed advocate for the business community, UK–China engagement, and children in need; driving impact through leadership roles in NGOs such as the British Chamber of Commerce South China and the charity Come Together Community, both of which he is currently serving as Chair.



Mr. Edmond Lau, FCMA, CGMA
CFO, Cyberport

Edmond Lau has over 25 years of experience in investment, financing and business development in technologies. He is now the CFO of Cyberport, the tech incubator and AI accelerator in Hong Kong, responsible for relevant strategic development and operations of the company. Previously, he was the Head of Investment, Head of Incubation, and Managing Director of listed companies and investment funds focusing on digital assets, fintech and mobile tech. He sat on the board of various private technology companies. Prior to that, he was the Investment Director in CLSA Capital Partners, VP in Citigroup and a senior consultant in Accenture focusing on TMT sectors.

Edmond holds an MBA (distinction) from London Business School, a Bachelor of Information Engineering (first class) from CUHK, and a Bachelor of Laws from China University of Political Science and Law. Edmond is devoted to finance plus technology and is often invited as a guest speaker/ panelist at prominent summits. He is the founding board member of CFA Shenzhen, former board member of CFA HK, Co-Chair of HK Digital Finance Association, board member of HK Venture Investment and Business Angel Network, ESS Assessment Panel of ITC, and a former adjunct professor/ lecturer in universities.



Mr. Simon Suen, FCMA, CGMA

Simon Suen has over a decade of work experience in Hong Kong capital markets, cross-border finance, and asset management.

He previously worked in corporate banking at a financial institution and later held positions at a Hong Kong-based licensed asset management firm, where he served as a Licensed Responsible Officer for Type 4 and Type 9 regulated activities, Head of Research, and Investment Director. His work experience covers areas including cross-border financing, equity investment, fixed income, asset allocation, and risk management.

In addition to his financial industry experience, Simon has also been involved in academic research. He has published papers in SSCI/CSSCI-indexed journals, participated in projects supported by the National Natural Science Foundation of China, and published related research outputs. He has also authored books related to the low-altitude economy and ESG.

Simon holds professional qualifications including FCPA (Aust), FCMA and CGMA. He received his Bachelor's degree in Economics and Finance from the University of Hong Kong, his Master's degree in Development Economics from the University of Queensland, and his Ph.D. in Management from Shanghai University of Finance and Economics.



Ms. Yan Zhang
CFO, Hilti Greater China

Chartered Financial Analyst | Professional Certified Coach |
Executive MBA

Yan is a seasoned finance executive with 20 years of experience across the aviation, healthcare, financial services, energy, and construction industries. Her career spans 15 cities across Asia, the U.S., and Europe, bringing a global perspective and strong cross-cultural leadership experience.

She is recognized for building high-performing teams, driving business value through strategic partnership, and fostering an inclusive, growth-oriented culture.

Passionate about people development, Yan coaches global leadership programs and mentors MBA students at the University of Hong Kong, helping leaders grow with purpose and confidence.

Moderator



Mr. Stephen Walsh, FCMA, CGMA
Director, Managed Services, KPMG
Past Chairman of CIMA HKSAR Area Committee 2023-24
Committee Member, CIMA Hong Kong SAR Area Committee 2026-28

Stephen is an experienced leader in Sales, Information Technology, M&A, Marketing, Operations, and Finance in the Asia region. His expertise lies in leading commercial and technical solution teams, driving complex Managed Services strategic sales that align with clients' Performance Optimisation and Digital Transformation journey focusing on risk management and regulatory requirements.

He holds the position of Director at KPMG Managed Services Hong Kong/China and Advisor to KPMG Global Managed Services. Previous positions include CFO, Mergers & Acquisition Executive, Sales Director, Business Development Executive and IT Project Manager.

Stephen is a Fellow of the Chartered Institute of Management Accountants (FCMA) and earned a Master of Information Systems from Curtin University, Australia. He is a past Chairperson of Hong Kong Branch Committee for the Chartered Institute of Management Accountants.

He is currently learning Italian and enjoys wine, photography and travel.

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