



### 資深顧問

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**方燕玲**  
Winnie Fang

### 專業資格

- 中華民國會計師
- 證券分析師
- 併購交易師
- 國際信託及遺產規劃師 TEP (Trust and Estate Practitioner)

### 學歷

- 東吳大學法律學院碩士
- 廈門大學金融學博士
- 政治大學經營管理碩士
- 美國杜蘭大學 MBA

### 語言

國語、英語

### 經歷

- 安侯建業聯合會計師事務所執行董事
- KPMG 安侯建業 金融服務業主持會計師
- 實用稅務出版社社長

### 家族傳承專業

- 家族信託及傳承架構之規劃
- 家族治理及家族憲章之規劃
- 家族資產控股架構之規劃
- 家族慈善事業規劃
- 家族基金及私募基金架構規劃
- 家族傳承相關法務諮詢
- 家族傳承相關稅務諮詢
- 家族辦公室設立之規劃

### 公協會現職

- 台灣金融科技協會 理事長
- 中華財富傳承顧問協會 創會理事長
- 台灣併購與私募股權協會 監事
- 台灣舞弊防治與鑑識協會 監事
- 台灣金融研訓院 家族信託規劃顧問師 講師

### 著作

- 公司法實戰守則主編（實用稅務出版）
- 我國金融業併購與整合之個案研究（碩士論文）
- 海峽兩岸金融控股集團發展研究（博士論文）
- 家族財富傳承（新陸書局出版）
- 家族傳承之法律機制：以信託與股權規劃為中心（碩士論文）

**Winnie Fang** Senior Of Counsel

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***PROFESSIONAL QUALIFICATION***

- Certified Public Accountant of the Republic of China
- Securities Analyst
- Merger and Acquisition Specialist
- International Trust and Estate Practitioner (TEP)

***EDUCATION***

- Soochow University, Master of Law
- Xiamen University, Doctor of Finance
- National Chengchi University, Master of Business Administration
- Tulane University, USA, MBA

***EXPERIENCE***

- Executive Board Director, KPMG Taiwan
- Lead Partner for Financial Services, KPMG Taiwan
- President, Practical Tax Publishing House

***CURRENT POSITIONS***

- Chairwoman, Taiwan FinTech Association
- Founder-Chairwoman, Chinese Wealth Heritage Consulting Association
- Supervisor, Taiwan Mergers & Acquisitions and Private Equity Council
- Supervisor, Association of Certified Fraud Examiners
- Instructor, Family Trust Planning Consultant, Taiwan Academy of Banking and Finance

***SPECIALIZATION/EXPERTISE – FAMILY SUCCESSION***

- Planning of Family Trusts and Succession Structures
- Planning of Family Governance and Family Constitution
- Planning of Family Asset Holding Structures
- Planning of Family Philanthropy Businesses
- Planning of Family Funds and Private Equity Structures
- Legal Consulting on Family Succession
- Tax Consulting on Family Succession
- Planning for the Establishment of Family Offices

***PUBLICATIONS***

- Editor-in-Chief of “Practical Guide to Company Law” (Practical Tax Publishing)
- Case Study on Mergers and Integrations in the Financial Industry of Taiwan (Master’s Thesis)
- Research on the Development of Bank Holding Company in Two Sides of Taiwan Strait (Doctoral Dissertation)
- Family Wealth Succession (Published by Xinlu Bookstore)
- The Legal Mechanism of Family Inheritance: Focusing on Trust and Equity Planning (Master’s Thesis)

***LANGUAGES***

Mandarin and English