

Financial Acumen for SMEs – Moving Beyond Accounting



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Speakers:

David Newton, Principal and Founder, Newton Carmen

Rosemary Goater, Co-founder & Managing Director,
SystematicEdge Limited

Vincent Leung, CFO, AOP Capital

Moderator:

Iain Reed, Co-Founder, EFA

Financial Acumen for SMEs – Moving Beyond Accounting

“Cashflow is king / cashflow is queen!”

Despite all the adages for effective finance in business, many SMEs regularly have problems stemming from their financial practices. In addition to cash on hand, many experience losses after investments to serve growing demand for profitable offerings, revenues constantly lower than expected and / or costs being higher, and capacity not aligning to the market. All while the books are balanced and the numbers 'add up'. Firms need skills and capabilities beyond accounting to avoid these pitfalls. Learn from leaders and practitioners how they manage these challenges with solutions that are practical and effective for SMEs. See how developing finance as a function can be cost efficient and practical, particularly as you scale for real growth.

About the speakers



David came to Asia in 1991 with Reuters to be a catalyst for change in the finance function leading financial systems projects in the region and later moving on to the regional management team of their Media division. Leaving Reuters in 2002, he has subsequently served as Asia Pacific CFO for the Financial Times LexisNexis and Haymarket up to June 2020 also concurrently running business divisions and corporate strategy. David specialises in leading change in the finance function by re designing processes and utilising new technologies. He has also built a wide network of business partners in the region which has facilitated the outsourcing of non-core business activities thereby making substantial reductions in enterprise costs and enabling cost-effective business development. He is a Mathematics graduate from Oxford

University a fellow of the Institute of Chartered Accountants in England & Wales and a member of the Financial Services Institute of Australasia.



Rosemary is co-founder of SystematicEdge which specialises in Systematic Investment and Currency Management Solutions. Before SystematicEdge, she spent 20 years of her career in executive search most recently with one of the leading global leadership consulting and executive search firms. Working within their global Financial Services practice, she had as clients the senior leadership teams across Asset Management, Hedge funds, Banking, & Insurance. She believes that

talent is the core of every business, and brings that ethos to her role at SystematicEdge.

She has lived 25 years in Asia, 6 years in Europe, and in addition to her native English she speaks Japanese and French fluently.

Rosemary holds a bachelor's degree in Business Administration from Simon Fraser University, and has an Executive Coaching Certification from Royal Roads University.



AOP is a corporate advisory & specialist investment strategies house. **Vincent** leads the Vault division which provides fractional CFO and outsourced legal counsel services. He works closely with executive management to diagnose and understand business issues and advises on solutions. He has over 16 years of experience in governance, strategic financial advice and operational management. He currently serves as Independent non-executive director for two HK listed companies. Previously, he also served as an Independent Director in the successful re-listing of Samson Paper on the HK exchange. Outside of his professional capacity, he

volunteers his time on the HK Council for Chartered Accountants Australia and New Zealand since 2017 and was its Chairman in 2020.

About the moderator



Originally from the UK, **Iain** has lived in in several regions of the Asia Pacific since 1989 arriving in Hong Kong in 2000. After graduating from Cambridge University he immediately set up his first Company, trading consumer

goods between Indonesia and the UK. He then spent 10 years as an investment analyst for Barclays De Zoete & Wedd, Société Générale, and CLSA before becoming a fin-tech founder at in 2003 spending 9 years as Managing Director before handing over to his co-founder to focus on angel investing and philanthropy.

He is now a co-founder in 4 businesses in AI and sustainability: efaplatform.com, efadrin.com, learnovate.ai and neemlondon.com. He has invested in dozens of startups and continues to provide mentorship to new founders where he can.

Iain has been a member of the British Chamber of Commerce in Hong Kong since 2003. He sits on the Financial Markets, Innovation & Technology, and SME & Startup committees. In addition, he is the Chair of the Business Angel Committee, the pioneer local programme connecting entrepreneurs with angel investors.

Iain is married with a son who live in Lamma Island and expect to remain there for many years to come.

This event is hosted by Jeremy Sheldon.

Ticket includes a full hot English breakfast buffet.

Please note that Business Attire is required by the Hong Kong Club - collared shirts must be worn by men, and jeans, sandals and sports shoes are not permitted. To see the full list of club rules on dresscode, please [click here](#).

Pricing

- Start-up Member: HK\$440
- Member: HK\$550
- Non-Member: HK\$680

Terms & Conditions

- Reservations in advance are required. Please consider your booking confirmed unless notified otherwise.
- Cancellations must be made in writing 24 hours prior to the event. No shows will be charged.
- This event is closed to the media.
- The event will be cancelled if the No.8 Typhoon signal or the Black Rain Storm warning is in force.
- By attending this event, you agree to be photographed, recorded, and/or filmed and give permission to use your likeness in promotional and/or marketing materials.
- For further information please email

catherine@britcham.com

- All payments for this event need to be settled by credit card through PayPal. Please note you do not need a PayPal account to complete payment.