


## Alex Chung

PARTNER | HONG KONG

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SECRETARY CATHY CHUNG

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### Alex is a partner in our private client and tax team.

Qualified in Hong Kong, New York and England & Wales, Alex's practice covers trust and estate planning, US taxation and cross-border probate matters.

As a trust law and US tax adviser, Alex advises high net worth individuals (including those with US connections) on the establishment and restructuring of their family trusts. He is also experienced in advising individuals in relation to their relinquishment of US citizenship or green card and their pre-US immigration tax planning, as well as those who are looking to invest in US real estate. He also assists individuals with coming into compliance with their US tax and reporting obligations.

In addition, Alex specializes in cross-border probate matters, in particular probate matters involving estates with US connections (such as estates of a US person decedent and estates of a non-US person decedent owning US situated assets). Alex has considerable experience in assisting personal representatives on obtaining grants of probate and letters of administration in Hong Kong, as well as working with foreign counsel in relation to the administration of estates in overseas jurisdictions. Alex also advises personal representatives on the US tax and reporting issues relating to the decedent's estate.

Alex also has considerable experience in drafting estate plans (often with cross-border elements) for high net worth individuals. Clients often appreciate the insights offered by Alex, as a probate practitioner, into the practical issues which executors might encounter during the estate administration process and what steps a testator could take during his lifetime to smoothen the probate processes (whether in Hong Kong or outside of Hong Kong).

Alex has also assisted clients with setting up a trust company in Hong Kong (including dealing with the relevant registration and TCSP licensing requirements), as well as assisting independent trust companies with preparing their precedent trust deeds.

Alex is recognized in Private Client Global Elite Directory 2024 as "Tier 1 - Private Client Global Elite" and Private Client Global Elite Directory 2023 as a "Global Elite - Lawyer". Alex was also ranked as a "Next Generation Partner in Private Client and Family" in Legal 500 (Hong Kong) 2024. He was recently acknowledged in the Citywealth Leaders List 2023/2024 as "recommended by private clients and peers" and for the "NextGen Top 40 under 40 - IFC 2023". Alex has also been recognized in ALB 2023's Hong Kong Rising Stars. Alex received the "Wealth Management Rising Star Under 40" Award at the Sixth Annual Greater China WealthBriefingAsia Awards 2021. He was also recognised in the Citywealth's 2021 "Top 100 Private Client Lawyers" list. He was also shortlisted as a Finalist for the "Young Practitioner of the Year (30 or Under)" Award at the 15th Annual STEP Private Client Awards 2020. Alex received the "Lawyer of the Year - IFC - Associate" Silver Award at the Citywealth Future Leaders Awards 2019, in addition to being named in the Citywealth's "2019 Future Leaders Top 100: Super Advisors" list. Alex was also awarded the "Private Wealth Lawyer of the Year (Hong Kong)" Award in Finance Monthly FinTech Awards 2019.

Alex is a full member (TEP) of STEP, and is currently a member of the Wills and Estates Sub-committee of STEP Hong Kong Branch.

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## Track record

### Hong Kong family trust work

Advising on the establishment and restructuring of family trusts and assisting independent trust companies with preparing their precedent trust deeds for their clients looking to set up Hong Kong trusts.

### Cross-border estate planning

Assisting individuals with preparing their estate plans (often with cross-border elements).

### Cross-border probate and tax matters

Assisting personal representatives with obtaining Hong Kong grants of probate or letters of administration, and working with foreign counsel in relation to the administration of estates in other jurisdictions including Singapore, the United States, the United Kingdom and the British Virgin Islands, as well as local tax and reporting issues.

### Expatriation planning

Assisting individuals with their expatriation planning and getting compliant with their US tax and reporting obligations.

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## Talks

- *Wills, probates, trusts and EPA*, Oct 2021

# External publications

'Coronavirus - Is it now time to review your estate plan?' - 13 Mar 2020, co-author

## Admissions

England and Wales, 2024

New York State, 2017

Hong Kong, 2016

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## Education

University of Hong Kong, P.C.LL., 2014

University of Hong Kong, LL.B., 2013

University of Hong Kong, BBA(Law) with Minor in Accounting, 2011

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## Languages

Cantonese

English

Mandarin

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## Memberships

Full Member, The Society of Trust and Estate Practitioners

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## Key dates

Year joined: 2019

Year became partner: 2023

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