



京華山一

Core Pacific - Yamaichi

財富管理 · 照亮您的財富





# 集團簡介

## About the Group

Core Pacific - Yamaichi Group, a long-established financial services institution in the Greater China Region, is committed to providing its clients in the region with a wide range of financial services including securities and futures brokerage services, wealth management, bond trading, corporate finance, placement, financial consulting and other investment-related professional services.

With our vision, objectives and dedication illustrated by our milestones, we have made big strides in tapping into a flourishing capital market in China. Through times of regional economic prosperity and adversity, we have grown into a strong financial service institution with a more than 300-strong professional team around the globe. Coupled with our global perspective from our local presence in Hong Kong, we offer comprehensive and quality investment banking services for our clients.

京華山一扎根大中華區，身為專業的金融服務機構，我們提供包括證券及期貨經紀服務、財富管理、債券交易、企業融資、配售、財務顧問等相關服務。過去的歷程證明了集團的遠見及決心，我們大步積極邁向正在繁榮興盛的中國資本市場，經歷了區內經濟的陽光和風雨，成長為一家實力雄厚的金融服務機構，在全球辦事處擁有超過三百名專業團隊成員，配合位處香港的國際化視野，為客戶提供全面性的優質投資服務。



# 財富管理

## Wealth management

Core Pacific - Yamaichi Wealth Management Group, established by parent Core Pacific – Yamaichi Group, is dedicated to serving emerging groups of affluent individuals in the Greater China Region. We are committed to developing ourselves into a leading regional wealth management platform providing an array of customized wealth management services for our premier clients. Our professional and client-focused services, as well as our unbiased and viable advices, allow our clients to grow their wealth, protect their family members, and achieve a high standard of living. We will work together with you along your journey of wealth accumulation at every stage of life.

京華山一財富管理是京華山一為專注服務大中華區的新富階層而設立，矢志成為首屈一指的財富管理平台，為客戶提供全面多元，量身打造的財富管理服務。專業貼心的服務，中肯切實的建議，在您人生的每個階段，我們與您攜手合作，創富人生。







# 了解需要 始終如一

## Understanding Your Needs

Each client has his/her favorite lifetime planning. Core Pacific - Yamaichi Wealth Management Group offers effective and viable investment solutions for our clients after fully evaluating their financial position, risk appetite and risk tolerance level. We also professionally take prudent measures and good custodial care of our clients' assets portfolios. Also, being your brilliant service provider managing your valuable assets, we will regularly provide you with detailed and concise consolidated statements of assets.

每位客戶都有自己夢想的人生規劃，京華山一財富管理誠摯地傾聽您的需要，週全評估您的財務狀況、風險偏好及風險承受能力。為您提供適當有效的投資方案。京華山一財富管理專業地看顧您的財富投資組合，做您財富的智慧好管家。



# 尊貴相傳 量身定造

## Customized Inheritance

A successful wealth inheritance solution can motivate and benefit multiple generations, thus ensuring a long-term sustainability of the family and its business. Core Pacific - Yamaichi Wealth Management Group offers exclusive wealth inheritance plans for high net worth individuals. In addition to being dedicated to protecting and growing its clients' assets, the Group gives its clients absolute peace of mind when they pass their wealth to their next generations, enabling them to enjoy an affluent and prestigious lifestyle.

成功的財富傳承，激勵子孫向上，造福後代，確保家族永續，基業常青。京華山一財富管理為高資產客戶提供個人獨特的財富傳承計劃，致力客戶資產的保障及增長，協助客戶在傳承財富的過程中，輕鬆自在，悠閒面對。盡享豐盛人生，尊貴榮耀。







# 攜手合作 創富人生

## Enrich Your Life

In addition to provision of prudent and professional financial services, Core Pacific - Yamaichi Wealth Management Group is your good partner in your journey of wealth accumulation. In keeping with the people-oriented and client-focused philosophy as our core principle, we provide caring and comprehensive investment and wealth management services, in addition to unbiased and viable advices on wealth management plans. We will work out an array of assets allocation plans for your sustainable growth of wealth to achieve your lifetime goals.

京華山一財富管理提供盡責專業的金融服務，是您人生創富的好夥伴。中肯切實的財富規劃建議，貼心全面的投資理財服務，抱持著『以人為本，以客為尊』的重要原則，為您安排全面多元的資產配置計畫，幫助您財富長期增長，實現人生理想。



# 洞悉市場 掌握脈動

## Market Pulse

Our professional research team always keeps abreast of market development and carries out for you in-depth research on the market and economy. Core Pacific - Yamaichi Wealth Management Group also provides you with professional and insightful reports on a regular basis, so that you can minimize your risk exposure in investment while seizing investment opportunities in an ever-changing environment. Working together, we can assist you in mapping out and fine-tuning your investment strategies so as to give full play to your investment advantages, while identifying potential market opportunities.

專業的研究服務團隊，時時為您關注市場脈動，深入研究經濟環境，京華山一財富管理為您提供專業、獨到的投資服務，使您在市場變動中，了解風險、掌握契機。助您制定策略，掌握全局。





# 專業平台 整合服務

## Integrated Services Platform

Core Pacific - Yamaichi Wealth Management Group offers its clients a one-stop integrated investment service through its professional investment platform. Our personal wealth management advisors take care and satisfy of your needs for choosing the right investment solutions. To help clients sensibly map out their own plans of wealth management, and enjoy a great quality of life.

京華山一財富管理擁有豐富的金融商品，為您提供一站式的整合服務。專責的理財顧問，全面評估您的理財需要。配合智慧高效的分析系統，為您規劃適合的投資組合。專業的投資組合含括多樣化產品，助您順利達成理財目標。





# 離岸理財 優勢盡顯

## Offshore Wealth Management

Core Pacific - Yamaichi Wealth Management Group is well positioned to cater an enormous market in the Greater China Region for wealth management services, thanks to its unique presence in Hong Kong, an international financial hub as well as a major international financial center and offshore wealth center. We always keep a close eye on real-time market updates and offer our unbiased, viable and insightful research. Moreover, our comprehensive and expedient services enable our clients to enjoy exclusive advantages of offshore wealth management.

香港身為重要的國際金融及離岸財富中心，京華山一財富管理背靠香港環球金融樞紐的獨特優勢，面向大中華龐大的財富管理需要，時刻關注全球市場的即時動態，提供中肯、獨到的研究資訊和全方位的金融服務，使您盡享離岸理財的投資優勢。





A close-up photograph of a hand with a pink manicure moving a black chess piece on a chessboard. The piece is a king, and it is being lifted from a light-colored square. Other chess pieces are visible in the background, slightly out of focus.

# 財務規劃與分析

## Customized Inheritance Planning

A person's need for and goals of wealth accumulation may vary at different stages of life. Core Pacific - Yamaichi Wealth Management Group has thus put in place a strong team of designated personal wealth management advisors for our premier clients to tailor make specific financial plans based on their financial position and risk appetite, after taking their valuable opinions into account. We also provide our clients with unbiased advices and caring customer service, while we meet their needs for various wealth management approaches, to assist you in living an affluent lifestyle.

人生的不同階段，對財富會有不同的需求及目標。京華山一財富管理為我們的尊貴客戶指派專屬的理財顧問，誠摯傾聽您的意見，依據財務狀況及風險偏好，為您安排量身定造的財務規劃，滿足您的理財需求，提供中肯的建議和貼心的服務，協助您走向富裕人生。



# 保險計劃

## Insurance plans

In addition to managing your wealth, we care about how you lead your life with our apt insurance plans that will enable you to safeguard your assets in an ever-changing environment. With our belief in client-focused approach, Core Pacific - Yamaichi Wealth Management Group painstakingly considers all of your current and prospective needs for insurance protection, and offers various insurance products to address your needs including critical illness coverage, children's education, quality retirement living and inheritance. With our good arrangement of insurance plans, gives you protection and accumulated cash to realize your dreams while feeling totally secure.

適當的保險規劃，使您在變動的環境中，安如磐石、穩若泰山。京華山一財富管理全面考慮您現在及未來保障需求，配合危疾保障、子女教育、優質生活及財富傳承等不同需要，為您提供適當的保險產品，安排專屬的保險計畫，為您實現人生夢想。





Core Pacific - Yamaichi Wealth Management Group has teamed up with its strategic partners to build an all-encompassing professional investment platform, which offers a choice of more than 600 investment funds covering numerous industries across the globe. Our one-stop service will save you time and costs of managing a number of accounts, while our intelligent and expedient tools for funds analysis will help you pick the most suitable funds based on your risk appetite and goals. With our excellent and quality investment portfolios, we can help you grow your investment returns.

京華山一財富管理建構完整專業的基金投資平台，提供600多支基金可供選擇，投資範圍覆蓋全球，主題涵括各種行業。一站式服務減少您管理不同帳戶的時間和成本。智慧方便的分析工具，配合您的風險偏好及理財目標，配置高效質優的投資組合，讓您的基金投資步步高昇。





# 投資移民

## Investment immigration

Core Pacific - Yamaichi Wealth Management Group provides our clients customized investment portfolios for their accounts for Capital Investment Entrant Scheme (CIES), as well as investment services such as stocks, funds, bonds and insurance, based on our analysis in terms of appropriateness to our clients. Prudent assets allocation can help diversify risk exposure and increase returns. We also provide our clients with comprehensive and professional advisory service, and arrange professional assets management service to safeguard that your assets are safe and steady growth.

京華山一財富管理為您的投資移民帳戶量身訂作投資組合，搭配您的投資適合性分析提供股票、基金、債券、保險等投資服務。穩妥的資產組合可以分散風險，增加收益，我們提供客戶全面的諮詢服務，為客戶安排專業的資產管理，使客戶的資產可以穩健增值。



# 策略結盟

## Strategic Alliances



CPY Wealth Management focus on Greater China's new rich class provides tailor-made wealth management services, we provide professional investment platform and comprehensive one-stop service. To discuss business cooperation, please contact us, contact the following:

China to Hong Kong Toll-Free Call : 4001203386

Taiwan to Hong Kong Toll-Free Call : 00801851623

Direct Line : (852) 2826 0036 Miss Hsu

Fax : (852) 2537 5079

Email: [wmgcs@cpy.com.hk](mailto:wmgcs@cpy.com.hk)

京華山一財富管理專注於為大中華區的新富階層提供量身定造的財富管理服務，我們提供專業的投資平台及完備的一站式服務。如需洽談業務合作，請與我們聯繫，聯繫方式如下：

大陸撥打香港免付費電話：4001203386

台灣撥打香港免付費電話：00801851623

直線電話：(852) 2826 0036 徐小姐

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