Background of Dr. Joy Wong

Dr. Wong is a registered psychologist in the UK and Hong Kong. She specialises in behavioural and cognitive therapy with over 20 years of experience in helping patients manage their problems by changing the way they think and behave. Dr. Wong is often invited to be a guest speaker on parenting, children's mental health, and "Mental Health First Aid" topics, promoting knowledge about basic mental health in an intelligible way to increase public awareness.

What unique qualities motivated you to choose Swiss Privilege as your wealth management partner?

I returned to Hong Kong from overseas around 2000 and planned to start my own practice. Back then, I knew very little about wealth management. I was not interested in investment because I thought all investment products are high-risk. By chance, I met a Swiss Privilege consultant who kindly explained the idea of wealth management to me, including the concept of risk and return. I realised the importance of having the right help from professionals, so I put my faith in Swiss Privilege as my wealth management partner.

How would you describe your relationship with your Swiss Privilege Relationship Manager?

I have an excellent relationship with my Relationship Manager, Sarah. I used to worry so much about incurring losses that I was reluctant to wealth management. Luckily, Sarah was very patient and professional. She analysed different types of wealth management products with me and helped me work out a strategy that most suits my needs.

Are there any stories or moments to share about you and your Swiss Privilege Relationship Manager?

Sarah always invites me to Club Suisse's gatherings and dinners. She even asked me to be the guest speaker in a parenting seminar, which was an exciting experience. She became a dear friend to me. I remember she visited me at home with gifts when my daughter was born, which was very heart-warming.

How does Swiss Privilege helped you in achieving your wealth management goals?

As I prefer a conservative approach to wealth management, Sarah often evaluates my wealth management performance with me and provides me with updated information on new products and market trends, so we can better adjust my future financial plans.

黃寶珊博士簡介

黃博士為英國及香港註冊心理學家，具有20多年的研究及臨床經驗，擅長以行為及認知治療協助患者改變思想及行為習慣，達至「自助自療」。黃博士亦經常應邀擔任客席講師，以淺白易懂的語言宣揚管教子女、兒童精神健康及「精神急救」概念，提高大眾對精神健康的基本知識及警覺性。

為何選擇瑞士尊貴理財為您的財富管理夥伴？

在2000年左右，我剛從外國回流香港，打算創一番事業。當時我對財富管理認知甚少，以為投資皆屬高風險活動，所以興趣不大。機緣巧合下，我遇到一位瑞士尊貴理財顧問，為我釐清理財概念，明白風險及回報，加上有專業人士為我把關，於是我便選擇了瑞士尊貴理財作為我的理財夥伴。

您會怎樣形容您與瑞士尊貴理財客戶經理的關係？

我和我的客戶經理Sarah關係十分友好。起初我對理財心存顧慮，怕稍一不慎便會招致損失。幸好Sarah細心及專業地為我分析各種財富管理產品的特性，助我制定適合自己的理財策略。

您與您的瑞士尊貴理財客戶經理最難忘的經歷 / 故事是？

Sarah常常邀請我參與Club Suisse的活動和晚宴，有次她更邀請我為一個親子講座擔任主講嘉賓，過程十分有趣。而且我們就像朋友一樣熟絡，記得我女兒剛出生時，Sarah捧著禮物到我家探訪，令我感到非常窩心。

瑞士尊貴理財如何助您達到財富管理的目標？

我偏好穩健的財富管理策略，所以Sarah會經常與我評估現時的財富管理組合表現，並為我介紹合適的新產品及最新市場資訊，以便調整未來的理財方向。