

## Tana Chan

Partner | Private Clients & Property | Hong Kong

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Tana specialises in private clients practice including wealth, later-life and succession planning, wills, probate and estate administration. She has extensive experience in advising both private and corporate clients in a broad range of legal issues relating to wills, probate and inheritance of wealth, and providing comprehensive legal services to individuals to ensure smooth transfer of family wealth. Tana's expertise lies in will preparation, handling local and foreign grant applications, administration and distribution of estates with multi-jurisdictional elements, and advising on enduring powers of attorney, advance directives, will trusts and succession matters in Hong Kong. Tana also speaks on succession-related topics in seminars for clients and wealth management industry.

Admitted as a Greater Bay Area Lawyer in 2023, Tana often assists clients from Mainland China with cross-border succession matters in Hong Kong.

Tana's experience includes:

- advising individuals and institutional clients as well as local and foreign law firms in court applications for grants of probate and letters of administration in common form and special grants in Hong Kong
- advising both local and overseas clients on succession laws, administration and inheritance of local and overseas estates
- coordinating with advisors based in other jurisdictions in relation to foreign grant applications, administration and distribution of overseas estates in Brazil, British Virgin Islands, Cayman Islands, Isle of Man, Italy, Japan, Jersey, Macau, Malaysia, Singapore, Spain, The People's Republic of China, Switzerland, Taiwan, United Kingdom and United States of America
- advising both local and overseas clients on preparation of wills and testamentary documents, inheritance claims, wills disputes, succession entitlements and resolving differences between personal representatives and beneficiaries
- advising major financial institutions in Hong Kong on duties and obligations in relation to deceased customers' accounts
- representing personal representatives in the administration and distribution of estates and will trusts in Hong Kong including preparation of estate accounts and estate administration involving sale of estate properties and/or transferring of estate properties by way of assents or vesting assignments to beneficiaries, transfer or disposal of deceased person's shares in private and public companies, insurance claims by beneficiaries and closure of deceased's bank and securities accounts
- assisting private clients in the creation and/or registration of enduring powers of attorney under Enduring Powers of Attorney Ordinance (Cap.501) and advance directives and providing relevant legal advice

Alongside her private clients practice, Tana also has experience in property-related transactions such as acquisitions and dispositions of property by way of private treaty, tender, sale and purchase of shares in property-holding companies, application for stamp duty relief for intra-group transfer of property-holding companies, vesting of trust properties from trustees to beneficial owners pursuant to trust documents, mortgages and property re-financing, leasing, and provision of legal opinions to foreign banks in respect of Hong Kong private companies.



### Principal Areas

- Private Clients
  - Wills and Estate Administration
- Real Estate

### Sectors

- Private Wealth

### Languages

- English
- Cantonese
- Mandarin

### Jurisdictions

- Solicitor, Hong Kong, 2015
- Greater Bay Area Lawyer, 2023

## Highlights

### Wills & Succession Planning

- Advised directors of listed companies and wealthy businessmen on Will preparation, wealth management and succession planning strategies including inheritance of listed and/or private companies shares, fund investments and securities accounts, and provisions for minor beneficiaries
- Advised a director and shareholder of a conglomerate of Singapore domiciliary on his worldwide Will covering assets in Hong Kong and wealth re-structuring
- Advised couples in Hong Kong on mirror Wills and succession plans for the spouse and children within the family and potential dependents' claims
- Advised a Mainland Chinese mother in the preparation of Wills and advised on her succession plan covering assets in Hong Kong, Germany and Canada, and provided an international succession planning solution for her with her children's trusts as beneficiaries

### Probate and Estate Administration

- Acted for individual and professional executors/administrators from time to time for Hong Kong domiciliary estates including the application for grant of representation in Hong Kong, preserving deceased's property from intermeddling, proving handwritten wills, and for vesting estate assets unto the beneficiaries
- Acted for a foreign institution with shares in a Hong Kong company held by a deceased employee as trustee and applied for the institution's representative as the court-appointed administrator and advised the administrator on procedures to administer the shares where the company was in vacuum
- Acted for an adopted child of a Japan domiciliary estate to apply for a grant of Letters of Administration and administer the deceased's bank accounts in Hong Kong
- Acted for the spouse of a Brazil domiciliary estate to apply for a grant of Letters of Administration in Hong Kong and to assent his Hong Kong property to the beneficiary
- Acted for an executor in a Hong Kong domiciliary estate which involves obtaining estate tax clearance with Internal Revenue Service of the Department of the Treasury and the Transfer Certificate and medallion signature guarantee for the deceased's US estate, and assisted the executor to transfer the deceased's US shares to the beneficiary
- Acted for an executor in an estate where the deceased was a successful entrepreneur with substantial assets in Hong Kong, BVI and UK, which involves applying for grant of Probate in Hong Kong, facilitating the application for BVI grant for the deceased's BVI companies shares, UK inheritance tax clearance and grant application, preparing agreement between the executor and the beneficiaries and estate accounts for distribution of the estate
- Acted for children for their mother's estate when their father was mentally incapable in the application for a grant of Letters of Administration during the father's mental incapacity
- Acted for administrators of Hong Kong domiciliary estates for estate duty clearance in Hong Kong
- Acted for executors/administrators of Hong Kong domiciliary estates to apply for grant *de bonis non* and administer unadministered estates

### Advisory

- Advised an agency company on recovery of service charges due from a deceased customer
- Advised financial institutions on the handling of deceased customers' accounts and the release of account balances
- Advised beneficiaries on entitlements in estates and legal actions available against the personal representatives of the estates; reviewed and advised on estate accounts from the perspective of the beneficiary

## More about Tana Chan

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### Accolades

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- Recommended in the area of Private Client and Family (Hong Kong) in Legal 500 Asia Pacific (2024)

## Appointments/Memberships

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- Member, The Law Society of Hong Kong
- Member, Family Office Practice Committee of The Law Society of Hong Kong
- Member, Greater Bay Area Lawyers Sub-Committee of The Law Society of Hong Kong
- Affiliate Member, The Society of Trust and Estate Practitioners (STEP)
- Distinguished Professional Mentor, Faculty of Law of The Chinese University of Hong Kong

## Education

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- LLB, The Chinese University of Hong Kong, 2012
- PCLL, The Chinese University of Hong Kong, 2013
- Passed Guangdong-Hong Kong-Macao Greater Bay Area Legal Qualification Examination, 2021
- Certificate for Module (Family Office Management Strategy) with Distinction, The University of Hong Kong School of Professional and Continuing Education, 2024
- STEP Advanced Certificate in Cross-Border Estates (with Distinction), 2024