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Intellectual Property Department


ASCEND
Advancing Future Banking Capabilities
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Knowledge

IP Financing: Briefing, Conducting and Reviewing Valuations

Programme Code: THGCC00P26071

9 July 2026 (Thursday)
12:00nn – 2:00pm


**2
HOURS**

HKIB SFC PWMA
CPD CPT OPT

Programme Outline

For bankers involved in IP financing decisions, this practical training session will include **checklists** and **case studies** for key valuation stages:

- › **Briefing:** Selecting the basis, premise and scope of value aligned with IP financing.
- › **Conducting a valuation:** Adhering to standards and applying methodologies that reflect the characteristics of different categories of IP.
- › **Reporting:** Articulating key assumptions and their impact on value; including the difference between market value and liquidation value.
- › **Reviewing:** Introducing a checklist to ensure bankers ask the right questions when discussing draft valuations and tracking loan risk.

Speaker Introduction



Tim Heberden, Managing Principal - Valuations, QANTM Valuations.

Specialised in IP valuation for over 25 years and author of the RICS guidance note on the Valuation of Intellectual Property Rights.



Jack Shan, Managing Principal, QANTM Valuations.

A CFA Charterholder and Registered Patent Attorney known for his holistic approach to IP valuation. Named as one of the world's leading patent professionals and IP strategists.

Target Audiences

1. Banking Practitioners
2. Relationship Managers, Compliance Officer, Risk Manager, Credit and Lending Officers
3. HKIB Professional Qualification Holders (eligible for CPD Core Hours):

CCOP(GC) CCOP(IIC) ACOP

CCRP(CL) CCRP(CPM) ACRP CRWP ARWP

CPFinT(W) CPFinT(S-AIBD) CPFinT(S-DLI) CPFinT(S-OBAP) CPFinT(S-RT) CPFinT(A)

CORP AORP ACsP



Programme Delivery

Virtual Classroom (Zoom)
English



Application DEADLINE

7 July 2026 (Tuesday) - Extended



APPLY NOW!

Enquiry :
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<https://hkib.org/page/284>

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Price	HKD660	HKD800	HKD880