

WEALTHTECH ENDOWUS DRIVES FINANCIAL INCLUSION IN HONG KONG

Leveraging Hong Kong's position as a premier global wealth management hub, Endowus delivers conflict-free, fee-only wealth advice while expanding financial empowerment to the underserved - women, domestic workers, and non-profits.

“Hong Kong's position as a world-leading wealth management and financial innovation hub provides the perfect foundation to scale conflict-free wealth advisory while driving meaningful financial inclusion for underserved segments.”

STEFFANIE YUEN

Managing Director, Head of Hong Kong
Endowus



“Conflict-free advice and serving Hong Kong's complex demographic reality — longer lifespans, more women managing wealth, and non-profits needing treasury optimisation — aren't two separate missions for us; they are the same one,” Steffanie Yuen, Managing Director and Head of Hong Kong at Endowus highlighted.

Licensed in Hong Kong and Singapore, Endowus operates as an independent, fee-only wealth management and investment platform and fiduciary advisor managing over US\$13 billion in group assets. “Fee-only” means clients pay directly based on the assets they have on the platform. By eliminating trailer fees, commissions or any form of compensation, the firm aligns its incentives purely with client outcomes.

Inclusive WealthTech for Underserved Segments

“Advancing financial access for underserved segments has always been a core pillar for Endowus, and it is an area I personally care a lot about,” Yuen shared. “Female empowerment, in particular, is close to my heart.”

To bridge the investment gap, Endowus launched WealthHERWay, an initiative

designed to build financial confidence and a supportive community for female investors. The company has collaborated with local NGOs to support pro-bono financial literacy workshops for foreign domestic workers, and co-hosted the reserves management workshop on treasury optimisation.

Hong Kong as Asia's Leading Strategic Wealth Hub

“Hong Kong sits at the heart of Asia's wealth creation, cross-border capital flows, and financial innovation,” said Yuen. “Hong Kong overtook Switzerland as the world's largest cross-border wealth management hub in 2026, reflecting the boundless opportunities the city offers. This strategic position delivered record results in 2025: Endowus Hong Kong doubled its client base, tripled assets under advice, and recorded a fivefold expansion in hedge fund and private market assets.”



Partnering with InvestHK for Long-Term Growth

InvestHK was instrumental in facilitating Endowus' market entry, providing guidance during the licensing process and supporting team relocations. Through flagship platforms such as Hong Kong FinTech Week, InvestHK continually connects Endowus with strategic business and community partners across the region.

Endowus

- Asia's leading independent, fee-only wealth platform managing over US\$13 billion in group client assets
- Raised over US\$130 million from global investors including UBS, Prosus Ventures, Lightspeed, and Citi Ventures
- Offers access to over 400 institutional-grade funds from 100+ global asset managers

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