

Organizer:



Media Partner:



 **FINANCIAL  
EDUCATION**  
**LEADERSHIP**  
*Awards 2018*



**cum Accredited Professional Financial Planning Firm**

In the presence of our  
Guest-of-Honor

**Mr. Joseph Chan, JP**

*Under Secretary, Financial Services and the Treasury, HKSAR*

12:00nn – 2:30pm

19 January, 2018

The Conrad Hong Kong

Sponsors:



## Program Rundown

**Cocktail Reception**

**Welcome Speech**

Mr. Paul Pong,  
Chairman of the IFPHK

**Guest-of-Honor Remarks**

Mr. Joseph Chan, JP  
*Under Secretary, Financial Services and the Treasury, HKSAR*

**Lunch Commences**

**Awards Presentation**

Corporate Financial Education Leadership  
Accredited Professional Financial Planning Firm  
Corporate Volunteer Team in Financial Education  
Best Corporate Financial Education Leadership of the Year

**Group Photos**

**Certificates Presentation**

Citizen Volunteer in Financial Education

**Appreciation**

The IFPHK would like to express its appreciation to the distinguished presenters :

**Mr. Andrew Wan,**

*Chief Financial Officer, Corporate Affairs, Securities and Futures Commission*

**Mr. Cheng Yan Chee,**

*Chief Corporate Affairs Officer and Executive Director, Mandatory Provident Fund Schemes Authority*

**Mr. Kenneth Dai,**

*Vice President, The Actuarial Society of Hong Kong*

**Mr. Graham Douglas Turl,**

*Chairman, Hong Kong Investment Funds Association*

**Ms. Ashley Khoo,**

*President, The Hong Kong Society of Financial Analysts*

**Mr. Sung Man Hei,**

*Managing Director, Metro Broadcast Corporation Limited*

## Introduction

The Financial Education Leadership Awards is a first-ever recognition organized by the Institute of Financial Planners of Hong Kong (IFPHK) to recognize all walks of life in contributing pro bono work to financial education. This is achieved by adjudication of work that meet the criteria with an award.



### Corporate Financial Education Leadership

Companies fulfilling specific criteria in financial education initiatives

For details:



#### Assessment Criteria

1. Digital/ Virtual
2. Print
3. Games
4. Open Events
5. Focus Groups
6. Support of Employees' Engagement
7. Vulnerable Groups
8. IT and Modular Examples
9. Co-effort Examples
10. Volunteering Programs
11. Employee Programs
12. Research Examples

### Best Corporate Financial Education Leadership of the Year

Companies fulfilling the most number of criteria in financial education initiatives

**Hang Seng Bank**  
**Manulife (International) Limited**

#### Commercial Firms

##### Gold Award

AIA International Limited  
Bank of China (Hong Kong) Limited  
Bank of Communications Co., Ltd. Hong Kong Branch  
China Construction Bank (Asia)  
Convoy Financial Group  
FundsUPERMART (FSM) HK  
FWD Life Insurance Company (Bermuda) Limited  
Hang Seng Bank  
Manulife (International) Limited  
Mercer (Hong Kong) Limited

Nanyang Commercial Bank  
Noble Apex Advisors Ltd  
PCCW  
Prudential Hong Kong Limited  
Sun Life Hong Kong  
The Hong Kong and China Gas Company Limited  
Visa

##### Silver Award

iFAST Platform Services (HK) Limited

#### Non - Profit Entities

##### Gold Award

Hong Kong Family Welfare Society Financial Education Centre  
Po Leung Kuk  
TWGHs Healthy Budgeting Family Debt Counselling Centre

### Corporate Volunteer Team in Financial Education

Companies that successfully encouraged their employees to enroll in Citizen Volunteer in Financial Education

Gold Award  
Gold Award  
Bronze Award

Manulife (International) Limited  
Noble Apex Advisors Ltd  
China Construction Bank (Asia)



### Accredited Professional Financial Planning Firm

Companies with 50 or more CFP professionals or AFP professionals (in alphabetical sequence)

For details:



AIA International Limited  
Bank of China (Hong Kong) Limited  
Bank of Communications Co., Ltd. Hong Kong Branch  
China Construction Bank (Asia)  
Convoy Financial Group  
FTLife Insurance Company Limited

FWD Life Insurance Company (Bermuda) Limited  
Hang Seng Bank  
Manulife (International) Limited  
Nanyang Commercial Bank  
Prudential Hong Kong Limited  
Sun Life Hong Kong

#### Acknowledgements

The Institute would like to express its sincere thanks to our judges, including Chairman Mr Paul Pong, Vice-Chairmen Mr Chris Tse and Mr Gin Lee of the IFPHK. We would also like to offer its gratitude to 75 citizen volunteers who contribute to financial education.