



## IFPHK Volunteer Program 2026

IFPHK always plays an active role in the ongoing development of the financial planning industry through our strong commitment to (1) provide financial planning certifications and continuing education programs for upholding the professional standards of the financial planning professionals; and (2) raise awareness of the importance of proper financial planning among the consumer public.

Reviewing continuing education programs and investing in raising the level of awareness and knowledge of financial planning among the consumer public are major objectives for IFPHK in 2026. IFPHK needs your support to achieve our objectives and we would now like to invite a group of dedicated and qualified CFP® professionals to join the IFPHK Volunteer Program. Through the IFPHK Volunteer Program, we would like to establish an expanding network of CFP professionals working in unison to raise the professional standards and increase awareness of the CFP certification and proper financial planning concepts.

As a member of the IFPHK Volunteer Program, you may choose to (1) act as a representative of CFP certificants in promoting the CFP certification and the importance of proper financial planning through different marketing and public relation activities or (2) conduct training on various financial planning topics as an instructor of the continuing education programs.

### Eligibility

- Active CFP professionals, with no less than 5 years of relevant working experience (i.e. practicing personal financial planning).
- Passionate in raising professional standards or promoting to the public the CFP certification and importance of financial planning.

### Application

CFP professionals interested in participating in the IFPHK Volunteer Program should send the following materials to the IFPHK office:

- Completed Application Form; and
- Current Resume attached with a name card (if applicable).

### Selection Criteria

#### *i. Industry Sector*

An equal mix among three main industry sectors, i.e. Banking, Insurance and Financial Advisory is crucial. This is to ensure that there is an equal representation of the volunteers from each industry sector.

#### *ii. Company*

To ensure there is a right mix of companies involved, we are looking to have CFP professionals from different companies participating in the program so that volunteers are from a large number of firms.

#### *iii. Expertise Area*

We are also looking for CFP professionals who possess knowledge or experience in specific areas in which there is a lack of expertise. The list of expertise areas is listed on the Application Form.



香港財務策劃師學會  
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#### **iv. Past Experience**

##### Ambassador

CFP professionals with media experience, have taken part in volunteer work, or have some public speaking experience will have an advantage.

##### Instructor

CFP professionals with extensive industry or training experience and possess relevant professional qualifications will be considered with priority.

#### **v. Commitment**

This will be assessed during the personal meeting. CFP professionals who have passion and shown their sincerity in joining the program and also share the same mission as IFPHK's will be a credit.

### **Roles of the IFPHK Volunteers**

#### **1. IFPHK Ambassadors**

As an IFPHK ambassador, He/ she will have ample opportunities to share knowledge and experience in financial planning with the consumer public. He/ she will be involved in various consumer events, interviews, columns at different public seminars or career talks.

##### **Media Interviews**

It is suggested that issues related to the IFPHK, CFP certification and IFPHK's standpoint on regulatory issues will be answered by IFPHK spokespersons, i.e. Members of Board of Directors or CEO while topics related to the general comments/concepts of financial planning will be handled by ambassadors.

##### **Promotion to Public and Industry**

Apart from promoting the importance of financial planning and raising awareness of CFP certification to the public, another key role for ambassadors is to promote the CFP certification to their peers, colleagues, and company and to influence them to consider or to attain the CFP certification to advance their career.

Each ambassador will be given an equal opportunity to take part in different IFPHK initiatives and media interviews. He/she will take turns in different projects. The general principle is to give everyone a fair opportunity.

#### **2. IFPHK Instructors**

IFPHK is always looking for qualified professionals to join its pool of high-calibre instructors. Let us know if you have what it takes to develop and conduct our continuing education programs on various topics such as asset management, financial planning, risk and retirement planning, insurance, tax planning, compliance and wealth management in the PRC, etc. The door is open for you to impart knowledge to your fellow professionals.



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**IFPHK Volunteer Program 2026  
Application Form**

**Personal Information**

Name (Eng): \_\_\_\_\_ Name (Chi): \_\_\_\_\_

CFP Certificant Number: \_\_\_\_\_

Current Employer: (Eng) \_\_\_\_\_ (Chi): \_\_\_\_\_

Current Position: (Eng): \_\_\_\_\_ (Chi): \_\_\_\_\_

Mobile Number: \_\_\_\_\_ Email: \_\_\_\_\_

Address: \_\_\_\_\_

**Academic and Professional Qualifications**

**Academic Attainment**

Institute/Issuing Authority: \_\_\_\_\_

Highest Attained Qualification: \_\_\_\_\_

**Professional Qualification**

Institute/Issuing Authority: \_\_\_\_\_

Professional Qualification: \_\_\_\_\_

**Volunteer Area (Please checkmark ONE capacity only):**

☐ IFPHK Ambassador ☐ IFPHK Instructor

**Expertise Area (You may checkmark more than one area):**

- ☐ Integrated Financial Planning Practice
- ☐ Insurance Planning / Risk Management
- ☐ Investment Planning / Asset Management
- ☐ Retirement Planning
- ☐ Tax Planning
- ☐ Estate Planning
- ☐ Property Investment
- ☐ Cross Border Issues (Please circle: HK/China; HK/US; HK/Canada; HK/Australia)
- ☐ Others (Please specify): \_\_\_\_\_

You may return the duly completed application form together with your resume and name card to [marketing@ifphk.org](mailto:marketing@ifphk.org) **on or before 30 January, 2026 (Friday)**. Shortlisted CFP professionals will be invited to attend to a meeting.



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