

IFPHK FINANCIAL EDUCATION LEADERSHIP AWARDS 2018

Organizer:











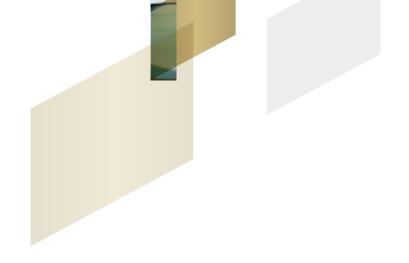












Corporate Financial Education Leadership

This Award aims to recognize collective efforts of commercial firms and non-profit entities have made to improve financial literacy in Hong Kong.

| Award | Commercial Firms | Non-Profit Entities |
|--------|------------------------------|------------------------------|
| Gold | Achieving 4 criteria or more | Achieving 3 criteria or more |
| Silver | Achieving 3 criteria | Achieving 2 criteria |
| Bronze | Achieving 2 criteria | Achieving 1 criterion |

Best Corporate Financial Education Leadership of the Year

For the commercial firm that has achieved the most criteria.

Certificate of Achievement

Recognizes organizations that have made contribution that do not fall into the below criteria.

Assessment Criteria

The Criteria is set out to demonstrate how financial education could be met. Submissions of the firms should specify and elaborate the criteria engaged.

The Criteria:

Digital/Virtual: Websites, apps, videos, social media platforms, online tutorials or hotlines that are available to consumers with free and impartial sources of information, tools and resources. Consumers are able to navigate the financial landscape and access the information they need

Print: Publication of books, toolkits and training materials for free financial education to the public

Games: Customized games for financial education

Open Events: Providing financial education through engaging and exciting competitions, road shows, etc

Focus Groups: Organizations focusing on what they know the best to offer a wide range of programs covering all aspects of financial education, e.g. seminars, talks, workshops and campus events

Support of Employees' Engagement: Organizations providing their employees with flexibility, support and encouragement to engage in policy-making and the creation of advocacy groups related to financial education

Vulnerable Groups: Special programs or resources for specific cohort groups, e.g. people experiencing high financial stress, people with low income or few assets, vulnerable seniors, and religious differences as they pertain to loans and borrowings

IT and Modular Examples: Disruptive technologies and business models for a better financial education future, including the Internet of Things, artificial intelligence and the sharing economy

Co-effort Examples: Partnership or sponsorship to support a financial education program run by a charity, school, non-profit organization or policymaker, e.g. competitions and championship programs

Volunteering Programs: Building a sustainable volunteer program in which promoting financial education is one of the goals or activities

Employee Programs: Providing in-house financial well-being programs and workplace programs for employees

Research Examples: Commissioning research, or holding forums or summits to highlight the need for financial education so that the best practices can be shared and publicized

Assessment and Judges

Entries will be assessed on their innovation, dedication and commitment by a judging panel comprising of the IFPHK's board members and experienced CFP^{CM} professionals.

Citizen Volunteer in Financial Education

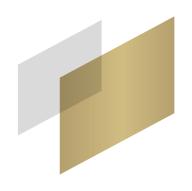
This Award is given to any individual* who has shown his or her commitment of time, energy and knowledge to deliver pro bono financial education services.

To be qualified, each individual has to meet the following requirements:

- 1. Individuals must complete at least one pro bono financial education event / program between 1 January 2016 and 30 June 2017.
- 2. The application must be duly endorsed by the event / program organizer or a service recipient. The event / program organizer must be a NPO registered in Hong Kong.
- 3. Service records, event pictures, etc., can also be provided as proof of evidence.

| Award | Eligibility | Number of Winners |
|----------------------------|-------------------|----------------------|
| Certificate of Recognition | 1 event / program | Unlimited |

Application Fee: HK\$300 (Including the Certificate of Recognition)





Corporate Volunteer Team in Financial Education

A special tribute will be made to companies that encourage their employees to enroll in the Citizen Volunteer in Financial Education with a corporate award.

| Award | Eligibility | Number of Winners | |
|--------|----------------------------------|----------------------|--|
| Gold | 20 or more Citizen Volunteers | Unlimited | |
| Sliver | 10 - 19 Citizen Volunteers | | |
| Bronze | 5 - 9 Citizen Volunteers | | |



^{*} Note: 'Citizen Volunteer' means all individual volunteers and is not just limited to financial services practitioners, financial planners, CFP^{CM} professionals, AFPTM professionals, etc.



IFPHK Financial Education Leadership Awards 2018

The Institute of Financial Planners of Hong Kong (IFPHK) was established in 2000 to develop and maintain high professional standards and self-discipline for providers of financial planning services in Hong Kong to ensure that consumers are well-served and their interests protected.

To align with the IFPHK's mission to increase awareness of the importance of financial planning, the IFPHK is organizing the first IFPHK Financial Education Leadership Awards 2018 in collaboration with Metro Finance to pay tribute to commercial firms, non-profit organizations and individuals that have made significant efforts in improving financial literacy levels in Hong Kong.

Objectives

- ► To recognize commercial firms, non-governmental organizations (NGOs), non-profit organizations (NPOs) such as schools, professional bodies, charities, social enterprises, etc., as well as individuals in providing public financial education to the community on a pro bono basis*
- ▶ To promote the importance of financial planning in Hong Kong
- To raise the overall level of financial literacy in Hong Kong

Eligibility

Open to all Hong Kong commercial firms, NGOs, NPOs and individuals who have invested, undertaken or completed their financial education tasks between 1 January 2016 and 30 June 2017.

* Definition of Pro Bono

The term Pro Bono is short for the Latin "pro bono publico," which means "for the public good." The term generally refers to free services that a professional provides to poverty-stricken clients, non-profit groups or charitable organizations. In the financial world, the term applies to free services or advice provided by a financial professional. (Investopedia, 2017)

Application Procedure

 Application for the above Awards should be submitted to the IFPHK via the electronic platforms together with supporting documents

Corporate Financial Education Leadership http://app.ifphk.org/FEA2017/EN_C/CorpApplicationForm_en.aspx

Citizen Volunteer in Financial Education http://app.ifphk.org/FEA2017/EN_I/IndividualApplicationForm_en.aspx

- Applicants must make sure that the information provided to the Awards Organizers is intact, accurate and factual
- The submission deadline is 6 November, 2017

Corporate Program Fee

► Corporate: HK\$25,000

Non-profit entities: HK\$5,000

The above fee includes:

- Trophy: As a token of appreciation, awardees will also be presented with a trophy at the Awards Presentation Ceremony to showcase their commitment in promoting financial well-being and corporate social responsibility.
- Awards Presentation Ceremony: Awardees (one nominee per Awardee) will be invited to the Presentation Ceremony. It will be held on 19 January, 2018. To mark this memorable occasion, government officials and industry figures will be invited to witness the naming of the winners.
- Advertisement in IFPHK Journal: Corporate Awardees are entitled to one full page of advertisement in Advisors Today, the official publication of the IFPHK.

Maximize Awardees' Benefit

To increase the promotional effect, various marketing platforms will be jointly arranged by the IFPHK and the media partner Metro Finance. Awardees could maximize their awarding benefit through the following channels:

Logo Use: Awarded firms are eligible to use the awarded logo for a year (1 January to 31 December, 2018). The "Use of Mark Guidelines" will be provided after the Awards' presentation ceremony.

Marketing Exposure: Names and logos of the awarded companies and names of the individual winners will be included in the Awards' promotional materials. Please refer to the package details provided by the Media Partner.

Metro Finance will contact with the awarding corporates on the promotion package and its related fee.



Key Dates

▶ 21 September 2017

6 November 2017

• 19 January 2018

Open for Entres

Application Dead Awards Prese

Ceremony

Individual Participants

Individuals are also eligible to participate in Ceremony with details of application to be The seats are offered on a first-come, first-

Enquiries

For Awards' details application, please contact:

Institute of Financial Planners of Hong Ko

13/F, Causeway Bay Plaza 2, 463 - 483 Lockhart Ro

Hong Kong

Tel: 2982 7888 Fax: 2982 7777

Email: marketing@ifphk.org Website: www.ifphk.or

For Promotion package, please contact:

Metro Finance

Ms. So

Tel: 3698 8700

Email: sherrys@metroradio.com.hk

Note: The organizer and media parter reserves the right to determine the final judging and promotional channels