

Organizer:



# LEADERSHIP

— Awards 2019 —

cum ACCREDITED PROFESSIONAL FINANCIAL PLANNING FIRM

In the presence of our  
Guest-of-Honor

**Mr. Joseph Chan, JP**

Under Secretary for Financial Services and the Treasury, HKSAR

Time: 12:00nn - 2:30pm

Date: 29 January, 2019

Venue: The Conrad Hong Kong

Supporting Organizations:



## Awards Introduction

The Financial Education Leadership Awards, organized by the Institute of Financial Planners of Hong Kong (IFPHK), recognizes all walks of the financial industry in contributing pro bono work to financial education.



For details:



### Corporate Financial Education Leadership

Companies fulfilling specific criteria in financial education initiatives

#### 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

#### Gold Award

AIA International Limited  
AXA 安盛  
Bank of China (Hong Kong)  
Bank of Communications (Hong Kong) Limited  
China Construction Bank (Asia)  
Convoy Financial Services Limited  
Dah Sing Bank, Limited  
Financial Dispute Resolution Centre  
Financial Education Centre, Hong Kong Family Welfare Society  
FTLife Insurance Company Limited  
FWD Life Insurance Company (Bermuda) Limited

Gain Miles Assurance Consultants Limited  
Invesco Hong Kong Limited  
MetLife Hong Kong  
Noble Apex Wealth Limited  
Po Leung Kuk  
Prudential Hong Kong Limited  
Sun Life Hong Kong  
The Hong Kong and China Gas Company Limited  
Tung Wah Group of Hospitals  
Healthy Budgeting Family  
Debt Counselling Centre

*\*In alphabetical sequence*

## **Best Corporate Financial Education Leadership of the Year**

Companies fulfilling the most number of criteria in financial education initiatives

Bank of China (Hong Kong)  
Prudential Hong Kong Limited

## **Corporate Volunteer Team in Financial Education**

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

**Gold Award**  
Noble Apex Wealth Limited



INSTITUTE OF FINANCIAL PLANNERS OF HONG KONG  
**ACCREDITED PROFESSIONAL  
FINANCIAL PLANNING FIRM**  
2019

For details:



## **Accredited Professional Financial Planning Firm**

Companies with 50 or more CFP<sup>CM</sup> professionals or AFP<sup>TM</sup> professionals

AIA International Limited  
AXA 安盛  
Bank of China (Hong Kong)  
Bank of Communications (Hong Kong) Limited  
China Construction Bank (Asia)  
Convoy Financial Services Limited  
Dah Sing Bank, Limited  
FWD Life Insurance Company (Bermuda) Limited  
Industrial and Commercial Bank of China (Asia) Limited  
Manulife (International) Limited  
Prudential Hong Kong Limited  
Sun Life Hong Kong

*\*In alphabetical sequence*

## Program Rundown

### Cocktail Reception

### Opening Remarks

Mr. Steve Chiu  
Chairman, IFPHK

### Keynote Speech

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

### Luncheon Commences

### Awards Presentation

Accredited Professional Financial Planning Firm  
Corporate Volunteer Team in Financial Education  
Corporate Financial Education Leadership  
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:

### Dr. Moses Cheng

Chairman, Insurance Authority

### Mr. David Kneebone

General Manager, Investor and Financial Education Council

### Mr. Cheng Yan Chee

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

### Mr. Andrew Wan

Chief Financial Officer, Corporate Affairs, Securities and Futures Commission

### Mr. Graham Douglas Turl

Chairman, Hong Kong Investment Funds Association