

Organizer:



LEADERSHIP

— Awards 2020 —

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: 15 January, 2020

Venue: The Conrad Hong Kong

Supporting Organizations:



LEADERSHIP

— Corporate 2020 —

For details:



Corporate Financial Education Leadership

Companies fulfilling specific criteria in financial education initiatives

Assessment Criteria

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

Best Corporate Financial Education Leadership of the Year

Companies fulfilling the most number of criteria in financial education initiatives

AXA Hong Kong and Macau
Nanyang Commercial Bank, Limited
Prudential Hong Kong Limited

Gold Award

AIA International Limited	Nanyang Commercial Bank, Limited
AXA Hong Kong and Macau	Noble Apex Wealth Limited
Bank of Communications (Hong Kong) Limited	Po Leung Kuk
Convoy Global Holdings Limited	Prudential Hong Kong Limited
Dah Sing Bank, Limited	Sun Life Hong Kong
Hong Kong Family Welfare Society Financial Education Centre	The Hang Seng University of Hong Kong
FTLife Insurance Company Limited	The Hong Kong and China Gas Company Limited
FWD Life Insurance Company (Bermuda) Limited	The Hongkong and Shanghai Banking Corporation Limited
Manulife Investment Management	TWGHs Healthy Budgeting Family Debt Counselling Centre

**In alphabetical sequence*

Corporate Financial Education Leadership for the Best Advocate

Companies demonstrated efforts in education of the tax deductible MPF voluntary contributions (TVCs), the premiums paid for qualifying deferred annuity policies (QDAPs) and the Voluntary Health Insurance Scheme (VHIS)

AIA International Limited

Convoy Global Holdings Limited

FTLife Insurance Company Limited

FWD Life Insurance Company (Bermuda) Limited

Prudential Hong Kong Limited

Sun Life Hong Kong

TWGHs Healthy Budgeting Family Debt Counselling Centre

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**
2020

For details:



Accredited Professional Financial Planning Firm

Companies with 50 or more CFP^{CM} professionals or AFPTM professionals

AIA International Limited

AXA Hong Kong and Macau

Bank of Communications (Hong Kong) Limited

Convoy Global Holdings Limited

Dah Sing Bank, Limited

FWD Life Insurance Company (Bermuda) Limited

Nanyang Commercial Bank, Limited

Prudential Hong Kong Limited

Sun Life Hong Kong

The Hongkong and Shanghai Banking Corporation Limited

**In alphabetical sequence*

Program Rundown

Cocktail Reception

Opening Remarks

Mr. Steve Chiu, CFP^{CM}
Chairman, IFPHK

Keynote Speech

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

Luncheon Commences

Awards Presentation

Corporate Financial Education Leadership
Corporate Volunteer Team in Financial Education
Accredited Professional Financial Planning Firm
Corporate Financial Education Leadership for the Best Advocate
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. Cheng Yan Chee

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

Mr. Christopher Hui

Executive Director, Financial Services Development Council

Mr. Andrew Wan

Chief Financial Officer, Securities and Futures Commission