



Press Release

IFPHK's Financial Planning Conference Discusses Art and Science of Financial Planning

(15 December 2010, Hong Kong) The Institute of Financial Planners of Hong Kong (IFPHK) today held the Annual Financial Planning Conference at the Hong Kong Convention and Exhibition Centre, as part of its 10th anniversary celebration.

“The Conference focused on the Art and Science of Financial Planning, and discussed both ‘hard’ information such as the market trends and mathematical principles, and ‘soft’ skills such as presentation skills. It underscores the belief that the path to success for practitioners lies in how they combine both art and science in financial planning. Overall, the Conference also reviewed current market needs and new financial planning products to help financial planning practitioners provide the most suitable advice to their clients,” said Ms. Eleanor Wan, Chief Executive Officer, Institute of Financial Planners of Hong Kong.

The Conference attracted over 500 financial planning practitioners. It covered a wide range of financial planning topics that were crucial to career development and raising standards in financial planning. They include:

- What Has Been Done to Reaffirm Hong Kong's Position as a Regional Wealth Management Hub
- The Latest Regulatory Initiatives on Selling of Investment Products
- Financial Planning as a Profession
- Market Outlook – Key Investment Themes for 2011
- The Art of Investment Advice
- Financial Planning 2020
- Strategies of Using Fixed Income Instruments in Your Client's Portfolio
- Asia in Perspective
- What's Next for China
- Hong Kong Property Market: Double or Bubble
- Regulatory and Compliance Updates
- Balances and Wisdom
- Reenergize and Renew Your Relationships with Powerful Client Review Meeting
- Talent Development: Everything You Wanted to Know About Managing the Post 80s' Planner

Three Keynote speakers helped to officiate the Conference, including Ms. Meena Datwani, Executive Director (Banking Conduct) of Hong Kong Monetary Authority; Mr. Stephen Po, Senior Director; Intermediaries Supervision Department of Securities and Futures Commission, Hong Kong; and Mrs. Francine Fu, Immediate Past President of Institute of Financial Planners of Hong Kong. The event also featured the following industry celebrities:

- Mr. Petrus Chan, Senior Manager Compliance, The Hongkong and Shanghai Banking Corporation Limited
- Dr. Chan Chung Mau, Chief Director, Hong Kong Holistic Health Centre
- Ms. Catherine Cheung, Head of Investment Strategy & Research, Citibank Global Consumer Group
- Mr. Steve Chiu, Vice President (External), Institute of Financial Planners of Hong Kong
- Mr. Manoj R. Dani, Director, Odyssey Consultants Limited
- Mr. Nicholas Kwan, Regional Head of Research, Asia, Standard Chartered Bank (Hong Kong) Limited
- Mr. Buggle Lau, Chief Analyst, Midland Realty
- Mr. Andrew Look, Managing Director & Chief Investment Officer, Look's Asset Management Limited
- Mr. Alan Luk, Assistant General Manager, Head of Private Banking & Trust Services, Hang Seng Bank Limited



- Mr. Paul Pong, President, Institute of Financial Planners of Hong Kong
- Ms. Eleanor Wan, Chief Executive Officer, Institute of Financial Planners of Hong Kong
- Mr. Quincy Wong, Chairman, Convoy Financial Group

For more information about the Financial Planning Conference 2010, please visit www.ifphk.org.

About IFPHK

IFPHK was established in June 2000 as a non-profit organization for the fast-growing financial industry. It aims to be recognized in the region as the premier professional body representing financial planners that uphold the highest standards to benefit the public.

The Institute is the sole licensing body in Hong Kong authorized by Financial Planning Standards Board Limited to grant the much-coveted and internationally-recognized CFP certification to qualified financial planning professionals in Hong Kong and Macau.


It represents more than 10,000 financial planning practitioners in Hong Kong from such diverse professional backgrounds as banking, insurance, independent financial advisory, stockbroking, accounting, and legal services.

Currently there are over 126,000 CFP professionals in 23 countries/regions; the majority of these professionals are in the U.S., Canada, Australia and Japan, with more than 4,100 CFP professionals in Hong Kong.

For Enquiry

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