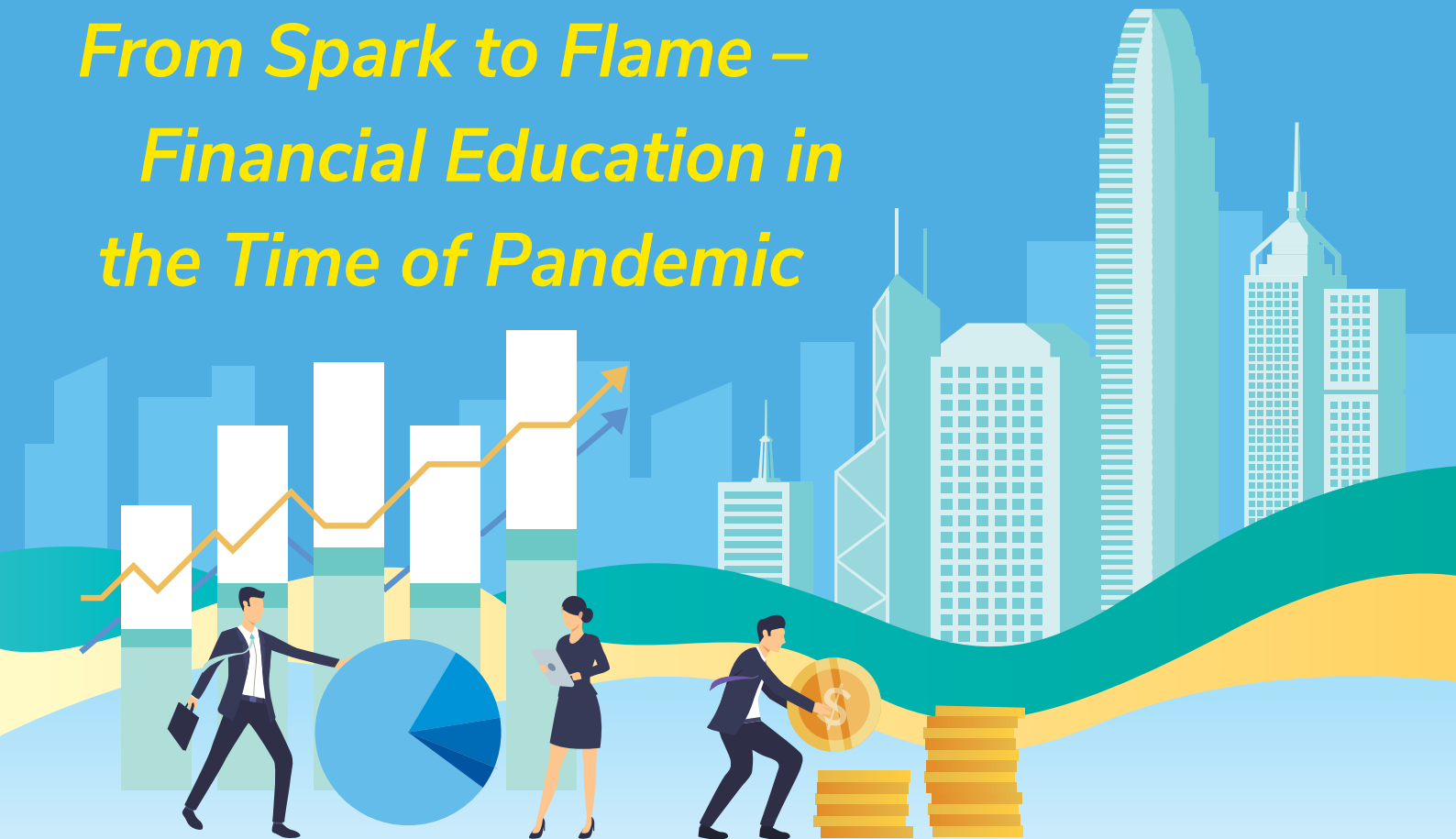


IFPHK FINANCIAL EDUCATION  
LEADERSHIP  
— Awards 2021 —

*From Spark to Flame –  
Financial Education in  
the Time of Pandemic*



Organizer:



IFPHK  
FINANCIAL EDUCATION  
LEADERSHIP AWARDS  
2021

Supporting Organizations:



# FROM SPARK TO FLAME – FINANCIAL EDUCATION IN THE TIME OF PANDEMIC



**Dennis Lau**

Chief Executive Officer  
Institute of Financial Planners of Hong Kong

We are most delighted that after a year of break the “IFPHK Financial Education Leadership Awards” (The “FELA”) is coming back in full swing. Since its establishment in 2018, the Awards has recognized 36 companies and hundreds of individuals for their restless effort in raising the financial literacy of the public. Over the years, FELA has gone from strength to strength, evolving into a reputable award that gathers and recognizes financial education efforts.

The world has spent most of the last two years fighting the COVID-19 pandemic that has traumatized the economics and communities. While we are recovering and adapting to the new normal, some unsung heroes have been delivering financial knowledge all along, traditionally or new-normally. They are the true believers in bettering lives through financial inclusion and advancing this idea.

To showcase the versatility of these achievers amidst growing uncertainties and mounting challenges, a special criterion is named “COVID-19 Pandemic-specific Initiatives”. It reminds us that financial education should be forward-looking and initiatives should be evolved constantly.

Early this year, the IFPHK has commissioned a survey on retirees’ actual expenses and has found out that finances get retirees jittery and they go to friends and family for advice instead of professionals. There is much catching up to do in terms of retirement planning education. Thus, we have specially named one of the criteria to be a retirement-centric focus, hoping to raise awareness of this.

“From Spark to Flame” is the theme for this year’s award. We believe financial education initiatives that start together will gradually build up to a stronger force. Through patience and persistence, we would grow to bring better prospects for the community. Join us in this journey.



## ABOUT THE AWARDS

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 has launched the "IFPHK Financial Education Leadership Awards" (The "FELA") since 2018 to pay tribute to commercial firms, non-profit organizations, and individuals that have made significant efforts in improving financial literacy levels in Hong Kong.

Now in its fourth year, the FELA has evolved into a representable indicator of companies and individuals with a financial education mission for the community. It will also adjust its awarding criterion from time to time to reflect and encourage timely financial education achievements.

## OBJECTIVES

1. 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
2. To promote the importance of financial planning in Hong Kong
3. 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 July 2019 and 30 June 2021.

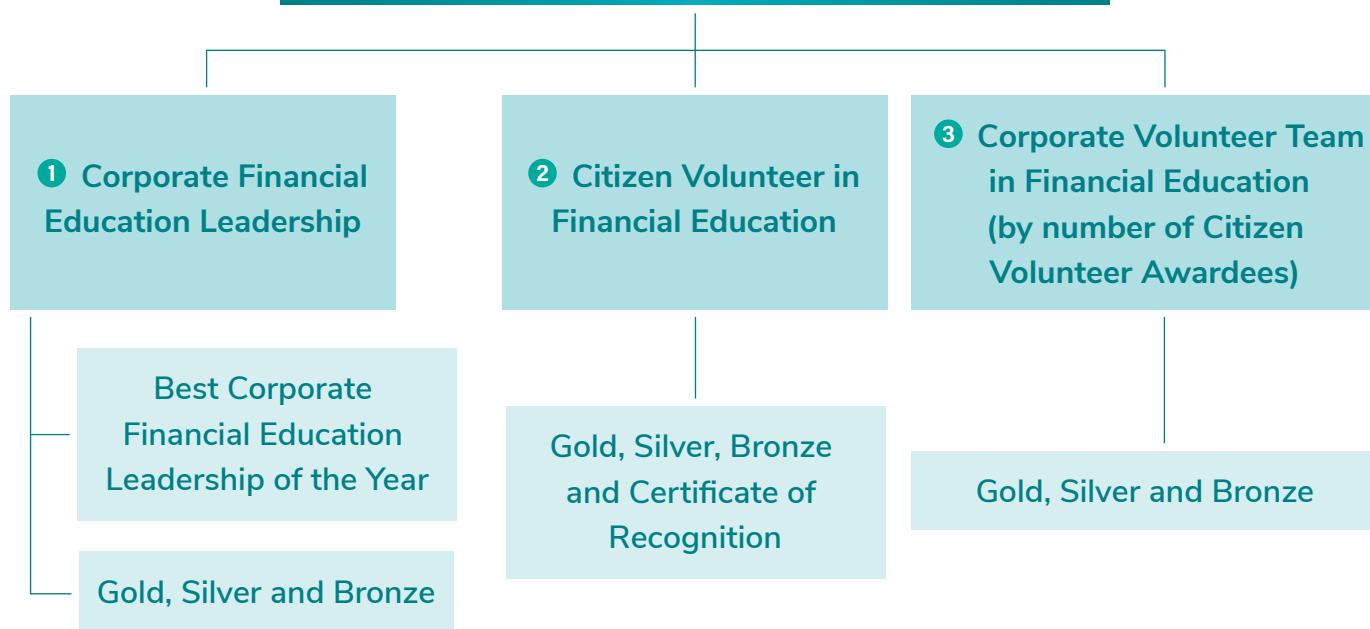
## ENQUIRIES

Institute of Financial Planners of Hong Kong  
13/F, Causeway Bay Plaza 2, 463 - 483 Lockhart Road, Hong Kong  
Tel: 2982 7888 Fax: 2982 7777  
Email: [marketing@ifphk.org](mailto:marketing@ifphk.org) Website: [www.ifphk.org](http://www.ifphk.org)  
Campign site: [www.ifphk.org/FELA2021/index.html](http://www.ifphk.org/FELA2021/index.html)

# AWARDS CATEGORIES

The Awards is open for applications under the following categories:

## IFPHK Financial Education Leadership Awards 2021



## KEY DATES

**6** JULY 2021

Open for Entries

**30** SEPTEMBER 2021

Application Deadline

**NOVEMBER –  
DECEMBER** 2021

Corporate Visit  
Awards Presentation

## APPLICATION

Applications for the “Corporate Financial Education Leadership” Awards and “Citizen Volunteer in Financial Education” Awards should be submitted to the IFPHK via online together with supporting documents.

**The submission deadline is 30 September 2021.**

### 1 Corporate Financial Education Leadership



### 2 Citizen Volunteer in Financial Education



Remarks: In case of any dispute, the decision of the organizer will be final and binding on all parties concerned.

# 1 CORPORATE FINANCIAL EDUCATION LEADERSHIP

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

Award	Commercial Firms	Non-Profit Entities
<b>Gold</b>	Achieving 4 criteria or more	Achieving 3 criteria or more
<b>Silver</b>	Achieving 3 criteria	Achieving 2 criteria
<b>Bronze</b>	Achieving 2 criteria	Achieving 1 criterion

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

For the commercial firm that has achieved the most criteria.



## ASSESSMENT CRITERIA

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

- Digital Campaign:** 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
- Apps:** Customized apps for financial education
- Events:** Providing public financial education through engaging and exciting events, road shows, focus groups, games, etc
- COVID-19 Pandemic-specific Initiatives:** Financial education initiatives that directly addresses the COVID-19 Pandemic
- Next Generation / Retirement-specific Initiatives:** Financial education initiatives that directly addresses on the topic of retirement or targeting the next generation

7. **Support of 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

8. **Innovative Examples:** Actively adopting technologies in business models for a better financial education future, including the internet of things, artificial intelligence and the sharing economy

9. **Co-effort Examples:** Partnership or sponsorship to support a financial education program run by a charity, school, non-profit organization or policymaker

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

11. **Employee Programs:** Providing workplace financial wellness programs for employees

12. **Research Examples:** Commissioning research to highlight the need for financial education so that the best practices can be shared and publicized

## ASSESSMENT AND JUDGES

The judging panel is comprised of the IFPHK's board members and experienced CFP® professionals.

# CORPORATE PROGRAM FEE

**Commercial Firms:** HK\$12,000

**Non-profit Entities:** HK\$2,000

The above fee includes:

**Trophy:** As a token of appreciation, IFPHK will visit corporate awardees and present them with a trophy to showcase their commitment in promoting financial well-being and corporate social responsibility.

**Advertisement in the IFPHK Journal:** Awarding commercial firms are entitled to complimentary advertisement in Advisors Today, the official publication of the IFPHK.

**Logo Use:** Awarded commercial firms are eligible to use the award logo for promotional purposes. The "Use of Mark Guidelines" will be provided.

**Marketing Exposure:** Names and logos of the awarded firms will be seen in the promotional materials, including the campaign webpage, print advertisements in leading local newspapers and social media promotion, etc.

## Corporate Program Fee

List of Benefits	Commercial Firms HK\$12,000	Non-profit Entities HK\$2,000
<b>Advertisement</b> Advertisement in Advisors Today	1 x Full Page 4C	/
<b>Corporate Visit Awards Presentation</b> Trophy presentation	☆	☆
<b>Promotion Exposure</b> Name mentioning in press release <hr/> Name and Logo in campaign webpage <hr/> Announcement feed in IFPHK facebook <hr/> Name and/ Logo on all post event advertisements	☆ <hr/> ☆ <hr/> ☆ <hr/> ☆	☆ <hr/> ☆ <hr/> ☆ <hr/> ☆
<b>Use of Logo Rights</b> Eligible to use the awarded logo	☆	/

Remarks:

1. The content of this package and all insertion dates are subjected to the Organizers' final approval.
2. Artwork for Advertisement in Advisors Today is not included; materials are to be submitted by participating firms.

## 2 CITIZEN VOLUNTEER IN FINANCIAL EDUCATION

This Award is given to any individual<sup>1</sup> who has shown their 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 have completed at least one pro bono financial education event / program between 1 July 2019 and 30 June 2021.
2. Applications must be duly endorsed by the event / program organizer or a service recipient. The event / program organizer must be an NPO registered in Hong Kong.
3. Service records, event pictures, etc., can also be provided as proof of evidence.

Award	Eligibility	Number of Winners
<b>Certificate of Recognition</b>	1 event/program	Unlimited
<b>Gold</b>	Being awarded for 5 years	
<b>Silver<sup>2</sup></b>	Being awarded for 3 years	
<b>Bronze<sup>3</sup></b>	Being awarded for 2 years	

Application Fee: HK\$300  
(including delivery fee of certificate)

## 3 CORPORATE VOLUNTEER TEAM IN FINANCIAL EDUCATION

A corporate award will be given to companies that encourage their employees to enroll as Citizen Volunteers in Financial Education.

**IFPHK FINANCIAL EDUCATION**  
**LEADERSHIP**  
*— Citizen 2021 —*

Award	Eligibility	Number of Winners
<b>Gold</b>	15 or more Citizen Volunteers	Unlimited
<b>Silver</b>	10 - 14 Citizen Volunteers	
<b>Bronze</b>	5 - 9 Citizen Volunteers	

Remarks:

1. "Individual" is not limited to financial services practitioners, financial planners, CFP® professionals, AFP® professionals, etc.
2. Silver awards will be given to "Citizen Volunteer" who have been awarded from 2019 to 2021.
3. Bronze awards will be given to "Citizen Volunteer" who have been awarded in both 2020 and 2021.





# 2020 EVENT HIGHLIGHTS

The “IFPHK Financial Education Leadership Awards 2020” Awards Presentation Ceremony concluded successfully on 15 January 2020. Mr. Joseph Chan, JP, Under Secretary for Financial Services and the Treasury of the HKSAR Government, graced the event as the Guest of Honor. Over 200 industry representatives come together to witness the naming of the “Best Corporate Financial Education Leadership of the Year”, “Corporate Financial Education Leadership”, “Corporate Financial Education Leadership for the Best Advocate”, “Corporate Volunteer Team in Financial Education” and “Citizen Volunteer in Financial Education” awardees. The ceremony ended on a high note as it drew support from 18 awarding corporates, 6 distinguished presenters, and 14 supporting organizations.



## Best Corporate Financial Education Leadership of the Year

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

## Corporate Financial Education Leadership (Gold Award)

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

## Corporate Financial Education Leadership for the Best Advocate

- 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 (Gold Award)

- Noble Apex Wealth Limited

© Copyright. All rights reserved 2021. The Institute of Financial Planners of Hong Kong Limited