



Press Release

SCMP/IFPHK Financial Planner Awards 2011 winners unveiled

(11 October 2011, Hong Kong) After eight months of intense competition, the seventh SCMP/IFPHK Financial Planner Awards drew to an exciting conclusion at the prestigious Awards Dinner, with **Professor K C Chan, Financial Services and the Treasury, HKSAR Government** grace the momentous occasion as our Guest of Honor. Held on 11 October 2011 at the Island Shangri-la, the high-profile annual industry event witnessed the naming of the Hong Kong's Best Financial Planner of Year 2011.

The Institute of Financial Planners of Hong Kong (IFPHK) and the South China Morning Post (SCMP) jointly organized the SCMP/IFPHK Financial Planner Awards. Being the only competition that provides an unbiased platform for financial planners from all three major industry sectors, including banking, independent financial advisory (IFA) and insurance, it aims to identify and reward rising talents in the fast growing financial planning industry in Hong Kong.

Amidst the celebrative atmosphere, Chairman of IFPHK, Mr. Paul Pong thanked the awardees for their diligent efforts. "We have experienced a keen and tough competition with all the trials and tribulations. The volatile and complex market has made the competition most challenging ever: unstable foreign markets, inflation surges, imposing regulations. Yet, this is the time when financial planning the most sought after," said Mr. Pong. He also thanked the judges for their effort in selecting the best and maintaining the high reputation of the industry.

SCMP/IFPHK Financial Planner Awards includes two categories: The University Student Category and the Practitioner Category. The former is a team-based category that is open to Hong Kong's university students. The latter category is open to all practitioners in the industry.

This year the organizers pay special tribute to the company winners of "Company for Financial Planning Excellence" for their tireless efforts to cultivate financial talents and had garnered the most winners in each industry sector. To recognize institutions of the three industry winners, it is also the first time the competition introduces the award "Company of the Year", for their success in training the financial talents. In order to get consumers involved in the industry competition while raising awareness of good financial planning, the competition featured the "My Favorite Financial Planner" award for the fourth year. Consumers were invited to vote for their favourite financial planner on the Event website.

Calibre of professionals gathered not only for self recognition, but to raise the industry standard through overcoming topical issues and demonstrating their abilities to meet clients' concerns. After all, financial planning is set up to serve the public, and the Awards aims at boosting the public's confidence towards the industry," added Mr. Pong.

Who are the winners

IFPHK would like to congratulate the following winners:

Practitioner Category

Hong Kong's Best Financial Planner of Year 2011

- Yiu Wai Yee Willie (Independent Financial Advisory Sector)

Industry Winner

- Cheung Ming Fai Julian (Banking Sector)
- Yiu Wai Yee Willie (Independent Financial Advisory Sector)
- Ho Yiu Lun Henry (Insurance Sector)



Company of the Year 2011

- Standard Chartered Bank (Hong Kong) Limited (Banking Sector)
- Ipac financial planning HK Ltd. (Independent Financial Advisory Sector)
- Ageas Insurance Company (Asia) Limited (Insurance Sector)

Company for Financial Planning Excellence 2011

- Standard Chartered Bank (Hong Kong) Limited (Banking Sector)
- Convoy Financial Services Limited (Independent Financial Advisory Sector)
- Manulife (International) Limited (Insurance Sector)

University Student Category

- The University of Hong Kong (1st Prize)
- Hong Kong Baptist University (2nd Prize)
- The Polytechnic University (2nd Prize)
- Hong Kong Shue Yan University (Consolation Prize)
- The Chinese University of Hong Kong (Consolation Prize)

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^{CM} certification and AFPTM 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 more than 133,000 CFP certificants in 24 countries/regions; the majority of these professionals are in the U.S., Canada, China, Australia and Japan, with more than 4,200 CFP certificants in Hong Kong.

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