



**For Immediate Release**

**IFPHK Announces Partnership with fundinfo AG and Lipper  
to Provide Free-of-Charge Fund Data Service to Hong Kong Investors**

(HONG KONG, 23 May 2012) Mr. Paul Pong, Chairman of the Institute of Financial Planners of Hong Kong (IFPHK), Mr. Phillip Portmann, Chief Executive Officer of fundinfo AG (fundinfo) and Mr. Alex Looijen, Business Manager, Asia ex-Japan, Lipper, a Thomson Reuters company (Lipper), today signed an agreement on co-operation at a signing ceremony in IFPHK office, witnessed by honorable guests including Members of Board of Directors of IFPHK.

The agreement reached and celebrated today brings together each organization's core strengths to offer members of the public free online access to up-to-date fund data and numerous fund documents (i.e. fund prospectuses, annual reports, monthly reports and key facts statements) for most unit trusts sold in Hong Kong at [www.ifphk.org](http://www.ifphk.org).

Fundinfo, a leading cross-border platform for original fund documents, mandatory publications and video clips in Asia, and Lipper, a leading fund data provider and fund research and analysis organization join with the IFPHK to bring a collaborative solution aimed to assist Hong Kong investors with their investment planning, strategies and decisions.

Mr. Paul Pong, Chairman of IFPHK said: "We are glad to know the partnership would provide a user-friendly, integrated solution to Hong Kong investors on making a wiser investment decisions. Advocating financial literacy and promoting greater awareness of the importance of financial planning in Hong Kong are primary missions of IFPHK."

Mr. Philipp Portmann, Chief Executive Officer of fundinfo said: "We are excited to be part of the Hong Kong fund market through our cooperation with IFPHK and our own website ([www.fundinfo.com](http://www.fundinfo.com)) now. We offer participating asset managers a cost-effective and business-efficient service along with the opportunity to greatly increase the transparency and extend the reach of the information provided, such as fund documents and fund manager videos. Valued partners such as the IFPHK portal enable us to achieve this goal in Hong Kong and several other distribution markets in Asia and Europe."

Mr. Alex Looijen, Business Manager, Asia ex-Japan, Lipper said: "Lipper is pleased to join this exciting partnership with fundinfo and IFPHK. We believe that financial planners and investors in Hong Kong will benefit from an independent source of fund information and subsequently serve their clients better and make well-informed investment decisions. This move also aligns with the latest business direction of Lipper to extend independent insight on fund data and analysis to the wealth management segment."



### **About IFPHK**

IFPHK was established in June 2000 as a non-profit organisation for the fast-growing financial industry. It aims to be recognised in the region as the premier professional body representing financial planners dedicated to upholding the highest professional standards.

The Institute is the sole licensing body in Hong Kong authorised by Financial Planning Standards Board Limited to grant the much-coveted and internationally-recognized CFP<sup>CM</sup> certification and AFP<sup>TM</sup> 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 4,500 CFP certificants in Hong Kong.

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### **About fundinfo**

Since 2005, Fundinfo Limited of Switzerland and its affiliate fundinfo Asia Limited pioneered and operate an innovative database and internet platform for investment funds and ETFs, promoting greater transparency and efficiency in the European and Asian fund and ETF markets.

fundinfo acts as a document warehouse for local and international asset managers for all fund documents and as a single point of entry for rapid and efficient distribution to public financial and fund platforms, banks, IFAs and retail investors. In addition, fundinfo represents a new supplement to traditional forms of advertising – print advertisement, fund listing, online banner - as fundinfo publishes original documents of fund houses on a large number of financial information platforms, thereby increasing the visibility of the funds.

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### **About Lipper**

Lipper, a Thomson Reuters company, provides independent insight on global collective investment schemes including mutual funds, retirement funds, hedge funds, fund fees and expenses to the asset management and media communities. Lipper is the world's leading fund research and analysis organisation, covering 231,000 share classes and 122,000 funds in 61 registered for sale universes. It provides the free Lipper Leader ratings for mutual funds registered for sale in over 30 countries. Additional information is available at [www.lipperweb.com](http://www.lipperweb.com).

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