



For Immediate Release

Institute of Financial Planners of Hong Kong Appoints Steve Chiu as New Chairman

(HONG KONG, 10 October 2012) – The Institute of Financial Planners of Hong Kong (IFPHK) is pleased to announce the appointment of Chiu Siu Po, Steve as Chairman of IFPHK for 2012-2013, succeeding Pong Po Lam, Paul with effect from 14 September 2012. Joining him are three new Board Members Chan Siu Man, Trevor, Jiang Haitao, Acen and Lee Hon Kit, Alex. IFPHK believes that their dedication, enthusiasm and valuable experience will bring fresh new ideas to raise financial planning standards in Hong Kong and Macau.

Steve Chiu, CFP (Hong Kong and China), CFA

New IFPHK Chairman Steve Chiu has over 20 years of experience in the financial services industry and extensive knowledge in wealth management products. He is currently Managing Director of Bosera Asset Management (International) Co., Limited, the Hong Kong subsidiary of Bosera Asset Management, one of the top five fund management companies in China, and is responsible for the company's sales and marketing functions in Hong Kong and other overseas markets.

Before joining Bosera, Steve was Managing Director of AIA Wealth Management Company Limited. Prior to that he served as Head of Retail Business, Asia ex Japan of Invesco Hong Kong Limited, where he was in charge of the mutual fund distribution in the region. Between 1991 and 2006, Steve was Associate Director of HSBC Asset Management and Senior Manager Investment Services in HSBC Retail Bank. Steve graduated from the University of Hong Kong with a B.Sc. degree. In 1995 he also attained Master of Business Administration degree from the Hong Kong University of Science and Technology.

In addition to the appointment of New Chairman, below are the bios of three new Board Members:

Trevor Chan, CFP^{CM}

Trevor Chan, the District Manager of AXA China Region Insurance Co. Ltd, who has been in the financial planning industry for over 20 years. He has been working in the HSBC for developing bancassurance in retail distribution channels. Now he is with AXA to build and grow "a team of customers' most preferred financial planners". Mr Chan was graduated in City University of Hong Kong with a Master of Science in Finance Fellow, and is Fellow, Life Management Institute and Associate of Hong Kong Institute of Bankers.

Acen Jiang, CFP (Hong Kong and China)

Acen Jiang, Director of C&R Financial Education Company Limited, is a certified AFP trainer at the CFP center of GuangDong University of Finance and acts as the Chief Editor of Jianghai Poetry and Director of many public organizations in Macao. He has served in a local bank as a Private Banker, responsible for offering investment and lending advises to high end customers as well as maintaining and developing customer relationships.



Alex Lee, CFP^{CM}, CFA, FRM

Alex Lee, Chief Marketing Officer of BEA Union Investment Management Limited, has 14 years of experience in the asset management industry in Hong Kong. He is responsible for the firm’s marketing, product, and business development in both wholesale and institutional markets. Prior to joining BEA Union Investment, he was Executive Director at UBS Global Asset Management (“UBS”), Allianz Global Investors, JP Morgan Asset Management, AllianceBernstein, and Janus Capital.

Dennis Lau, Chief Executive Officer of IFPHK said, “We are honored to have Steve Chiu, Trevor Chan, Acen Jiang and Alex Lee as part of our institute. We are sure that their presence and valuable contribution will make them an ideal addition to IFPHK’s existing governing board, and lead the financial planning to be a respected profession in near future.”

IFPHK Board of Directors 2012/2013 :

Position	Name	Name of Company
Chairman	Chiu Siu Po, Steve	Bosera Asset Management (International) Co. Ltd
Vice Chairman - Development	Tse Yue Hong, Chris	FTSE Group
Vice Chairman - Finance & Administration	Wong Yuk Loi, James	The Prudential Assurance Co. Ltd
Director	Chan Siu Man, Trevor	AXA China Region Insurance Co. Ltd
	Cheung Tao Fai, Thom	Nomura International (HK) Limited
	Chiang Chun Yu, Brian	HK & Shanghai Banking Corp. Limited
	Chiu Wai Lim, William	BCT Financial Limited
	Choy Chung Foo	BOC Group Life Assurance Co. Limited
	Chung Chun Kit, Ricky	The Open University of Hong Kong (LiPACE)
	Jiang Haitao, Acen	C&R Financial Education Company Limited
	Lam Chong Hang, Alvin	Swiss Privilege Limited
	Lee Hon Kit, Alex	BEA Union Investment Management Limited
	Pong Po Lam, Paul	Pegasus Fund Managers Ltd.
	Wong Lai Sheung, Cherie	Honest Advisory Group Ltd.

About IFPHK



The 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 that uphold the highest standards to benefit the public.

The Institute is the sole licensing body in Hong Kong authorised by Financial Planning Standards Board Limited to grant the much-coveted and internationally-recognised CFP^{CM} certification and AFPTM certification to qualified financial planning professionals in Hong Kong and Macau.



It represents more than 6,800 financial planning practitioners in Hong Kong from such diverse professional backgrounds as banking, insurance, independent financial advisory, stock broking, accounting, and legal services.

Currently there are more than 139,000 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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