



INSTITUTE OF FINANCIAL PLANNERS OF HONG KONG 香港財務策劃師學會

ACCREDITED PROFESSIONAL
FINANCIAL PLANNING FIRM
優質財策企業

2017

PRESS RELEASE

Awarded Firms Unveiled for the “IFPHK Accredited Professional Financial Planning Firm 2017”

(Hong Kong - 12 January, 2017) The Institute of Financial Planners of Hong Kong (IFPHK) today (Thursday) announces the results of the “IFPHK Accredited Professional Financial Planning Firm 2017” award. This year, a total of 17 firms from the banking, insurance and independent financial advisory sectors have been given the mark in recognition of their commitment in providing professional financial planning services to the general public.

Mr Dennis Lau, Chief Executive Officer of the IFPHK, said: “The IFPHK praises the tireless efforts of the awarded firms in raising the professional standards of the financial planning industry in Hong Kong. The IFPHK believes that advancing the financial literacy of the public can help people seeking proper financial planning advice to achieve their life goals. It is the way forward for the betterment of society. The IFPHK has therefore committed itself to organizing events to promote the importance of financial planning, and encouraging financial planning practitioners and the profession to lift their professional standards to world-class levels.”

The “IFPHK Accredited Professional Financial Planning Firm” scheme was launched in 2012. The scheme aims to encourage local financial planning firms to hire more CFP^{CM} professionals and AFPTM professionals as part of the commitment to provide professional financial planning services to the public. The firms must come from the following categories, namely, the banking, insurance or independent financial advisory sector.

The award is given only to qualified firms that have met the minimum requirement of employing 50 CFP professionals and/or AFP professionals. The awarded firms are entitled to display the award logos as a hallmark of their professionalism in their promotional materials, websites and offices. Consumers can expect holistic financial planning advice from financial planning practitioners who are CFP professionals or AFP professionals who work in firms that have received the “Accredited Professional Financial Planning Firm” award.

Congratulations to the “IFPHK Accredited Professional Financial Planning Firm 2017” awardees, which are listed in alphabetical order as follows:

Banking	Insurance
<ul style="list-style-type: none"> - Bank of China (Hong Kong) Limited - Bank of Communications Co., Ltd. Hong Kong Branch - The Bank of East Asia, Limited - China CITIC Bank International Limited - China Construction Bank (Asia) Corporation Limited - Citibank - Dah Sing Banking Group Limited - Hang Seng Bank - Nanyang Commercial Bank 	<ul style="list-style-type: none"> - AIA International Limited - AXA Hong Kong - FTLife Insurance Company Limited - FWD Life Insurance Company (Bermuda) Ltd. - Manulife (International) Limited - Prudential Hong Kong Limited - Sun Life Hong Kong Limited
Independent Financial Advisory	
<ul style="list-style-type: none"> - Convoy Financial Services Limited 	

For more details, including the judging criteria, please visit the IFPHK website: www.ifphk.org.



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About IFPHK

IFPHK was established in June 2000 as a non-profit organization for the fast-growing financial services industry. It aims to be recognized 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 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 7,200 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 161,000 CFP certificant in 26 countries/regions; the majority of these professionals are in the U.S., Canada, China, Australia and Japan, with more than 4,600 CFP certificant in Hong Kong.

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