



Press Release

IFPHK's Third Retirement Planning Conference Highlights Post-Crisis Trends

(15 June 2010, Hong Kong) The Institute of Financial Planners of Hong Kong (IFPHK) today held the third installment of the highly-successful Retirement Planning Conference.

“The conference answered an important question on many financial planners’ minds: retirement planning after the financial crisis. Besides unearthing new trends and opportunities that financial planners should consider, it also addressed how current efforts for healthcare reforms will shape the market. Overall, the conference aims to keep financial planners inline with current market needs and new retirement products so that they can better serve their retiring or retired clients,” said Ms. Eleanor Wan, Chief Executive Officer, Institute of Financial Planners of Hong Kong.

Held at the Hong Kong Convention and Exhibition Centre and featuring high-profile industry celebrities, the one-day Conference took a hard look at the effects of the economic crisis and the financial planning opportunities as the market recovers. The event, which was targeted at practitioners in Hong Kong, attracted over 450 financial planners and covered the following topics:

- After the Storm: What’s Next for the Markets and the Economy
- Panel Discussion: Development of Retirement Products and Solutions
- Developing Reverse Mortgage for Retirement Protection
- Positive Psychology for Retirement Plans
- Housing Bubbles in Hong Kong and China: A Macro Perspective
- Panel Discussion: Revisiting Health Care Reform in Hong Kong
- Managing Client Needs In Estate Planning
- Adding Life to Retirement Years

The event was officiated by the Hon Bernard Chan, GBS, JP, Chairman of the Council for Sustainable Development, who gave a keynote speech about “Moving Towards a Sustainable Future.” It also featured industry celebrities including:

- Ms. Elaine Chan, Committee member, Medical Insurance Association, HK Federation of Insurers
- Mr. Steve Chiu, Vice President (External), Institute of Financial Planners of Hong Kong
- Mr. Jones Lam, Deputy Chief Agency Officer, Agency Professional Development, Agency Administration Department, The Prudential Assurance Co. Ltd.
- Mrs. Doris Lau, Consultant, Customer Relationship Management
- Mr. Peter Lau, Chief Actuary, Zurich Insurance Group (Hong Kong)
- Mr. Thomas Lee, Chief Marketing Officer, AIA Co. (Bermuda) Ltd.
- Mr. George Leung, Advisor, Strategy and Economics, Asia Pacific, HSBC
- Mr. Chi Lo, Head of Overseas Investment, Ping An of China Asset Management (HK) Ltd
- Ms. Belinda Luk, Senior Vice President, Pensions & Group Business, BestServe Financial Ltd.
- Mr. Frederick Ma, Honorable Lecturer, The University of Hong Kong
- Dr. Isaac Ng, Lecturer, Social & Human Sciences Section, City University of Hong Kong
- Mr. Paul Pong, Vice President (Development), Institute of Financial Planners of Hong Kong
- Dr. Hung Hing Tse, President, The Hong Kong Medical Association
- Ms. Eleanor Wan, Chief Executive Officer, Institute of Financial Planners of Hong Kong

For more information about the Retirement Planning Conference 2010, please visit: <http://www.ifphk.org/data/pdf/pd/conference.pdf>



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 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 over 126,000 CFP professionals in 23 countries/regions; the majority of these professionals are in the U.S., Canada, Australia and Japan, with more than 4,000 CFP professionals in Hong Kong.

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