



Press Release

IFPHK's Retirement Planning Conference 2011 Resets the Retirement Planning Strategies

(8 June 2011, Hong Kong) The Institute of Financial Planners of Hong Kong (IFPHK) today held the Retirement Planning Conference 2011 at the Hong Kong Convention and Exhibition Centre, with focus discussions on formulating winning strategies for creating proper retirement planning under the recent high inflation economic environment.

"Retirement planning is one of the most important parts among our life plans, each of us should anticipate and plan ahead to build a successful retirement plan," said Ms. Eleanor Wan, Chief Executive Officer, Institute of Financial Planners of Hong Kong.

The Conference attracted over 300 financial planning practitioners. It covered a wide range of retirement planning topics that were overwhelmingly concerned by the public. The in-depth discussion gave insights to the practitioners to uplift their professional standards, which further facilitated them to tailor made the most appropriate retirement planning strategies for their clients.

Mr. Paul Pong, CFP^{CM}, President of Institute of Financial Planners of Hong Kong, officiated the Conference. The event also featured the following industry celebrities as speakers:

- Enhancing the Regulation of MPF Intermediaries
 - Mr. Robin Gill, Chief Manager (Supervision), Mandatory Provident Fund Schemes Authority
- Mid-Year Review: What's Going On In the Next Six Months?
 - Mr. George Leung, Advisor, Asia-Pacific (Strategy & Economics), The Hongkong and Shanghai Banking Corporation Limited
- It's Time to Fight Against Inflation: Winning Investment Strategies to Grow and Protect Your Client's Retirement Funds
 - Ms. Linda Luk, CFP^{CM}, Vice President, Head of Retail & Intermediary Channels (HK and Singapore), PineBridge Investments
 - Mr. KP Luk, Head of Institutional Business, Hong Kong, Fidelity International
 - Ms. Bonnie Tse, CFP^{CM}, Senior Vice President & Managing Director, AIA Pension and Trustee Co. Limited
- It's Time to Fight Against Inflation: Winning Investment Strategies to Grow Your Client's Assets
 - Mr. Marco Tang, Head of Intermediary Business, JP Morgan Asset Management
 - Mr. Alex Lee, CFP^{CM}, Executive Director, UBS Global Asset Management
 - Mr. Vicks Poon, First Vice President and Head of Investment Advisory, Fubon Bank (HK) Limited
- Housing Options for Retirement: From the Outlook of the Property Market to Reverse Mortgage Pilot Scheme 2011
 - Mr. Johnny Chan, Principal Financial Planner, Prudential Assurance, Hong Kong
 - Dr. the Hon Leong Che-hung, GBM, GBS, JP, Chairman, Elderly Commission
 - Mr. Paul Pong, CFP^{CM}, President, Institute of Financial Planners of Hong Kong
 - Professor Raymond So, Dean, School of Business, Hang Seng Management College
- Rewarding Retirement Life: Giving Back to the Society
 - Ms. Ka Shi Lau, Managing Director & CEO, BCT Financial Limited/ Bank Consortium Trust Co. Limited
- Unveil the Retirement Plans of Successful Financial Services Professionals
 - Mr. Steve Chiu, CFP^{CM}, Vice President (External), Institute of Financial Planners of Hong Kong
 - Mr. Bruno Lee, Regional Head of Wealth Management, Retail Banking & Wealth Management, Asia-Pacific, The Hongkong and Shanghai Banking Corporation Limited



- Ms. Eleanor Wan, Chief Executive Officer, Institute of Financial Planners of Hong Kong
- Mr. Quincy Wong, Chairman, Convoy Financial Group

For more information about the Retirement Planning Conference 2011, please visit www.ifphk.org.

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 133,000 CFP professionals in 24 countries/regions; the majority of these professionals are in the U.S., Canada, Australia and Japan, with more than 4,200 CFP professionals in Hong Kong.

For Enquiry

Callista Wong
Tel: 2982 7831
Email: callistawong@ifphk.org

CFP^{CM} Certification *Global excellence in financial planning*

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