

FOR IMMEDIATE RELEASE

The IFPHK Hosting the First World Financial Planning Day with FPSB In Support of the IOSCO's World Investor Week 2017

(Hong Kong – 19 September, 2017) – The Institute of Financial Planners of Hong Kong (“IFPHK”) announced that it will host the first World Financial Planning Day (#WFPD17) in Hong Kong, as a support to the Financial Planning Standards Board (“FPSB”) initiatives during the International Organization of Securities Commissions’ (IOSCO) World Investor Week (#WIW2017). The World Financial Planning Day is set as Wednesday, 4 October, 2017.

During World Financial Planning Day, the IFPHK and all FPSB's affiliate organizations representing a global community of over 170,000 CERTIFIED FINANCIAL PLANNER^{CM} professionals will provide programs to promote consumer awareness and understanding of financial planning topics including debt management; preparing for an unexpected financial emergency; home ownership; building savings; investment planning; and preparing for retirement.

In Hong Kong, the IFPHK will host live financial clinic on Facebook, where consumers submit financial enquiry in advance, and IFPHK Vice-Chairman Chris Tse will give advice about their situation. CFP professionals will also serve as subject-matter experts on financial topics and share their advice prior to the WFPD as a prelude of these financial education initiatives.

“The IFPHK has advocated on financial literacy in Hong Kong for years and has strived to leverage the financial planning industry standard in all ways possible. We are excited to support the global effort launched by the IOSCO and the FPSB with our greatest commitment. The vision of raising financial literacy is never as close as this year, as the IFPHK launches Financial Education Leadership Awards in a parallel time frame. This is definitely a win-win for the community and the industry,” said Dennis Lau, CEO of IFPHK.

IOSCO's World Investor Week is a global campaign from 2-8 October designed to raise awareness about the importance of investor education and protection, and to highlight the investor education and protection initiatives of securities regulators around the world. As part of its global campaign, IOSCO has invited securities regulators from six continents, alone or in partnership with local and international nonprofit groups, to provide programs and events to promote the importance and value of investor education and protection.

“IOSCO recognizes that the need for investor education and protection has never been greater, and we are pleased that FPSB has rallied the global financial planning community to support World Investor Week,” said Paul Andrews, IOSCO Secretary General.



“FPSB has launched World Financial Planning Day to increase consumers’ level of financial literacy and capability, and to help consumers understand the value of financial planning and making investment choices within the context of financial and life goals,” said FPSB Ltd. CEO Noel Maye. “FPSB and the global community of CFP professionals look forward to the opportunity to partner with IOSCO and securities regulators globally in empowering more consumers to take control of their finances and their futures.”

“We are excited to highlight the value of investor education and the work being done by securities regulators and others to increase investor financial literacy during World Investor Week and World Financial Planning Day,” said José Alexandre Vasco, Chair of IOSCO’s Committee on Retail Investors. “World Financial Planning Day will raise awareness of financial planning as a global citizenship skill that will help millions of citizens save and invest to improve their financial wellbeing and build a better future.”

For details about World Financial Planning Day activities globally, please visit the World Financial Planning Day [website](#).

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 7,600 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 171,000 CFP certificants 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 certificants in Hong Kong.

About Financial Planning Standards Board

FPSB benefits the global community by establishing, upholding and promoting worldwide professional standards in financial planning. FPSB demonstrates its commitment to excellence with the marks of professional distinction – CFP, CERTIFIED FINANCIAL PLANNER and  – which it owns outside the United States. FPSB has a nonprofit member organization in the following 26 territories: Australia, Austria, Brazil, Canada, Chinese Taipei, Colombia, France, Germany, Hong Kong, India, Indonesia, Ireland, Israel, Japan, Malaysia, New Zealand, the Netherlands, the People’s Republic of China, the Republic of Korea, Singapore, South Africa, Switzerland, Thailand, Turkey, the United Kingdom and the United States. At the end of 2016, there were 170,101 CFP professionals worldwide. For more, visit fpsb.org.

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