



INSTITUTE OF FINANCIAL PLANNERS OF HONG KONG
**FINANCIAL EDUCATION AWARDS CUM
ACCREDITED PROFESSIONAL
FINANCIAL PLANNING FIRM**



Press Release

For Immediate Release

Financial Education Awards Cum Accredited Professional Financial Planning Firm 2013 Ends on a High Note

(HONG KONG, 28 November 2013) – Organized by the Institute of Financial Planners of Hong Kong (IFPHK), with the Hong Kong Economic Times as media partner, “Financial Education Awards Cum Accredited Professional Financial Planning Firm 2013” ended on a high note at an Awards Presentation Ceremony on 28 November. Nineteen awards were presented to the winning firms including banks, insurance companies, independent financial advisory corporations, asset management companies, independent investment research and global payments and technology companies.

Mr. Andrew Wan, Chief Financial Officer and Senior Director, Corporate Affairs, the Securities and Futures Commission, graced the awards presentation ceremony as the Guest-of-Honour, along with Mr. Steve Chiu, Chairman of IFPHK, the members of the judging panel Professor Raymond So, Dean of the School of Business and Professor of Finance of the Hang Seng Management College; Mr. Jonathan Ng, Executive Director of the Hong Kong Institute of Certified Public Accountant; Mrs. Sally Wong, Chief Executive Officer of the Hong Kong Investment Funds Association; and Mr. Dennis Lau, Chief Executive Officer of IFPHK. The Awards aim to recognize the firms that have taken up corporate social responsibility to drive up public’s participation in financial education for the benefit of Hong Kong in the past year.

At the ceremony, Mr. Steve Chiu, Chairman of IFPHK emphasized that advancing financial literacy of the public is the way forward for the betterment of society. In this connection, IFPHK has been working hard to promote the importance of financial planning to the public, and to boost the professional standards of financial planning practitioners and the profession to world-class levels.

Mr. Steve Chiu said, “IFPHK has received keen support from government regulators and the industry. IFPHK believes that improving financial literacy in Hong Kong can equip the general public with skills and knowledge to make sensible investment decisions. In addition, the Awards offers an opportunity for firms to showcase their commitment to fulfill their social responsibility as corporate citizens, which will help to enhance investors’ confidence, benefit the financial services industry, as well as reinforce the position of Hong Kong as an international financial centre in the long term.”

This year, IFPHK continues to pay tribute to the winners of “Accredited Professional Financial Planning Firms” for their effort in recruiting and retaining CFP^{CM} certificants and AFPTM certificants. In order to get more firms involved in the Awards, IFPHK has revamped the “Financial Education Awards” which covers four major categories: (1) Children and Youth; (2) Adults; (3) Professional Training and Development and (4) Publication and Multi-media.

The awarded firms are shown as below:

Financial Education Awards Cum Accredited Professional Financial Planning Firm 2013 Company of the Year – The Prudential Assurance Co. Ltd

Children & Youth Category

- Excellence in Wise Money Management – The Prudential Assurance Co. Ltd
- Excellence in Education Planning – The Prudential Assurance Co. Ltd
- Financial Competition of the Year – Citi



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Adults Category

- Excellence in Wealth Management Education – JPMorgan Funds (Asia) Limited
- Excellence in Retirement Planning Education – The Prudential Assurance Co. Ltd
- Excellence in Family Financial Planning Education – Citi
- Best Adult Financial Education of the Year – The Prudential Assurance Co. Ltd

Professional Training & Development

- Best Professional Training & Development Program – FWD Life Insurance Company (Bermuda) Limited
- Professional Training & Development Company of the Year – Citi

Publication & Multi-media Category

- Children's Book of the Year – Visa Hong Kong Limited
- Adult's Book of the Year – Morningstar Asia Limited
- Website of the Year – Standard Chartered Bank (Hong Kong) Limited
- Financial Mobile Apps of the Year – Standard Chartered Bank (Hong Kong) Limited
- Innovative Educational Game of the Year – Citi

Accredited Professional Financial Planning Firm 2013

- Banking Sector
 - Bank of Communications Co., Ltd, Hong Kong Branch
 - Standard Chartered Bank (Hong Kong) Limited
- Insurance Sector
 - The Prudential Assurance Co. Ltd
 - FWD Life Insurance Company (Bermuda) Limited
- Independent Financial Advisory Sector
 - Convoy Financial Services Limited

Media Enquiry:

Ms Agnes Lee Tel: (852) 2982 7875

Email: agneslee@ifphk.org

Ms Natalie Wong Tel: (852) 2982 7831

Email: nataliewong@ifphk.org

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About IFPHK

The 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^{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, stockbroking, accounting, and legal services.

Currently there are more than 147,000 CFP certificants in 25 countries/regions; the majority of these professionals are in the U.S., Canada, China, Australia and Japan, with more than 4,800 CFP certificants in Hong Kong.