



Press Release

For Immediate Release

**IFPHK Financial Planning Conference 2013
Over 10 Government Regulators and Industry Figures Join Hand with Some 500 Practitioners
to Explore “The Changing Face of the Financial Planning Landscape”**

(HONG KONG, 18 December 2013) – Organized by the Institute of Financial Planners of Hong Kong (IFPHK) as one of its key signature events, the Financial Planning Conference 2013 was successfully held yesterday (17 December) at the Hong Kong Convention and Exhibition Centre. The theme of the conference was “The Changing Face of the Financial Planning Landscape”. The Conference attracted more than 10 government regulators, financial experts and property analysts as well as two overseas speakers to share their wisdom with over 500 participants.

The Conference covered a wide range of topics in financial planning. Senior government regulators talked about the regulatory updates on the Mandatory Provident Fund system and the sale of investment products, while prominent industry figures shared their views on hot financial topics including Special Stamp Duty and its impact on the property market, RMB and ETF investment strategies, the unique financial needs of high networth Mainland Chinese clients and their preference for various investment immigration programs. The aim of the Conference is to help financial planning practitioners stay up-to-date to meet their professional needs.

In his opening address, Mr. Steve Chiu, Chairman of IFPHK said, “In the past year, the global financial market continued to be plagued by uncertainties. In spite of this, there are opportunities for financial planning practitioners to demonstrate their true value and to set themselves up for success. Apart from its ongoing efforts to promote the high standards of CFP^{CM} Certification and AFPTM Certification, IFPHK will continue to work with companies and firms to elevate industry standards, so that financial planning becomes one of the recognized professions in Hong Kong. We hope that the Conference will help financial planning practitioners keep abreast of the latest developments in the industry, and to give them an opportunity to meet with fellow practitioners for professional discourse.”

Mr. Chiu also urged financial planning practitioners to be attuned to the opportunities ahead. He said, “Like many developed countries, the population in Hong Kong is ageing. The issues in Hong Kong present both risks and opportunities for retirement planning services, and financial planning practitioners must be fully prepared to deal with them.”

In line with IFPHK’s focus on retirement planning next year, this year’s Conference included presentations on the Mandatory Provident Fund Scheme.

“Financial Planning Conference 2013” covered diversified topics shown below:

Speech	
MPF System: Development and Reform Cynthia Hui Executive Director (Supervision) Mandatory Provident Fund Schemes Authority	What is Professional Financial Planning? The Perspective of the General Public Simon Lee, CPA Senior Lecturer of Accounting and Finance School of Hotel and Tourism Management CUHK Business School
The Latest Regulatory Updates on the Sale of Investment Products Stephen Po Senior Director Intermediaries Supervision Department Securities & Futures Commission, Hong Kong	Building a Balanced Investment Portfolio by using Index ETF Linda Luk, CFP ^{CM} , BBA Managing Director, Retail & Intermediary Sales Vanguard Investments Hong Kong Limited
RMB Strategies: the Fixed Income Trend, Approach and Outlook Dr. Ronald Chan, CPA (Australia) Managing Director, Fixed Income – Senior Portfolio Manager Manulife Asset Management (Asia)	International Developments in Financial Advice (English) Hamish Worsley, B. Comm, FIAA Partner, NMG Consulting Director, NMG Group
The True Value of the Mandatory Provident Fund (English) Francis Chung Chief Executive Officer MPF Ratings Ltd	How to Match the Financial Needs of High Net Wealth Clients from Mainland China? (Putonghua) Andrew Yen, CFP (Taiwan & China) Senior Advisor SRG International Financial Service



Forum	
<p>Is Property Still a Good investment? Have the New Stamp Duty Measures Made Property Ownership More Affordable?</p> <p>Moderator: Steve Chiu, CFP^{CM} Chairman, Institute of Financial Planners of Hong Kong</p> <p>Speakers: Derek Cheung, CPA Chief Executive Officer, New Century Asset Management Limited Manager, New Century Real Estate Investment Trust</p> <p>Jacky Luk Head of the Property Section, Ming Pao Principal Advisor, property.mpfinance.com</p> <p>Raymond Ho, MRICS, MHKIS, RPS(GP), CIREA, MSc (e-com) Managing Director, Vigers Group</p>	<p>Unique Financial Planning Needs for Dual Citizenship Clients</p> <p>Moderator: Chris Tse, CFP^{CM} Director, Asia FTSE Group</p> <p>Speakers: Dr. Eric Tsang President of China Law Research Association Committee Member of Guangdong Foreign Investment Law Society</p> <p>Wilson Kwok, CFP^{CM}, FCPA, CA, MA(HONS), CTA Managing Director, LKKC C.P.A Limited Consultant, Baker Tilly Hong Kong CPA Limited</p>

For details on the conference such as topics and guest speakers, please visit IFPHK website at www.ifphk.org, or click [HERE](#) to download information.

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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.