

FOR IMMEDIATE RELEASE

**Institute of Financial Planners of Hong Kong
Lunar New Year Gathering Demonstrates Industry Leadership Gathers Professional Elite
to Explore Investment Opportunities in the Year of the Horse**

(Hong Kong/Macau, February 26, 2026) The Institute of Financial Planners of Hong Kong (IFPHK) successfully hosted the "2026 Lunar New Year Members' Gathering Event – 2026 Investment Opportunities and Feng Shui Astrology Outlook" at its premises on February 25 (the 9th day of the Lunar New Year). The event brought together 100 professionals and industry leaders from the finance and wealth management sectors, creating a vibrant atmosphere that fully demonstrated the Institute's cohesion and representativeness as an industry hub.

The event commenced with a performance by the award-winning Buddhist Ho Nam Kam College Dragon and Lion Dance Team. The resounding drums and the auspicious lion dance symbolized vitality and great success for the industry in the new year. Dr. Paris Yeung, Chief Executive Officer of the Institute, presented a certificate of appreciation to the team, commending the younger generation's dedication to traditional culture. He then joined Mr. Edwin Cheung, Chairman of the Institute, and other guests for a group photo, adding to the joyous occasion.

In his welcoming address, IFPHK Chairman Mr. Edward Cheung extended his best wishes for a prosperous and successful Year of the Horse. He said, "The horse has long symbolised strength, vitality, and forward momentum. In this dynamic Year of the Horse, I encourage financial services professionals to continue advancing with determination and professionalism, leveraging their expertise to help clients seize opportunities and create sustainable wealth and value through professional financial planning."

The highlight of the event was the forum on "2026 Investment Opportunities and Feng Shui Astrology Outlook," moderated by Mr. Alvin Chan, a member of the IFPHK Board of Directors. The distinguished speakers included Mr. Bruno Lee, a renowned financial expert and Convenor of the Investor and Financial Education Council (IFEC)'s Working Group on Financial Education for Working Adults and Seniors, and Mr. Aries Tung, a seasoned industry professional. The forum delved into the global economic outlook for the Year of the Horse, the impact of inflation and interest rates, artificial intelligence, energy transition, and geopolitical situations on capital markets. It also analyzed the "Red Horse Red Sheep" astrological concept from both feng shui and professional perspectives, offering practical investment strategies and retirement planning advice tailored to market realities. The content was pragmatic and forward-looking, fully showcasing the professional role and market influence of financial planners in wealth management.

The subsequent Q&A session was met with an enthusiastic response, with participants actively engaging with the speakers on topics such as AI applications, energy sector allocation, and cross-market asset allocation. During the networking session that followed, industry elites engaged in dialogue in a relaxed atmosphere, further strengthening professional networks and fostering industry collaboration.

The Institute also prepared auspicious red packets for every attendee, symbolizing prosperity and good fortune, heralding an auspicious start to the new year. Other distinguished guests in attendance included Dr. Keith Yu, Dr. David Pun, Vice-Chairmen of the Board of Directors, as well as members of the board Mr. Arthur Lam, Mr. Stephen Chan, Mr. Gifford Chen, and Mr. Andrew Ma.

The IFPHK has recently organized a series of high-profile events, continuously deepening member engagement and promoting professional exchange within the industry. Looking ahead, the Institute will continue to organize diverse activities and high-quality training programs, committed to enhancing the professional standing of the CFP® certification in Hong Kong and Macau, increasing public awareness and trust in financial planning services, supporting the industry's stable development, and strengthening Hong Kong's core competitiveness as an international wealth management center.

Photo Caption: <https://photos.app.goo.gl/VcVQ8HAN5C3gWkoX7>



Photo 1: The Dragon and Lion Dance Team of Buddhist Ho Nam Kam College delivered an energetic lion dance performance at the “2026 Spring Members’ Reception — 2026 Investment Opportunities and Annual Feng Shui & Destiny Outlook,” with resounding drums heightening the festive atmosphere.



Photo 2: Representatives of the Dragon and Lion Dance Team of Buddhist Ho Nam Kam College received a token of appreciation from Dr. Paris Yeung, CEO of IFPHK.



Photo 3: Veteran financial professional Mr. Bruno Lee, IFPHK Board Member Mr. Alvin Chan, and Mr. Aries Tung provided multi-faceted analyses of the “2026 Investment Environment Analysis and Outlook.”



Photo 4: Members received festive red gift bags, sharing in the joy of the Lunar New Year celebration.



Photo 5: The event was marked by a vibrant atmosphere and a strong sense of Lunar New Year celebration.

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 and AFP® certification to qualified financial planning professionals in Hong Kong and Macau.

Currently there are more than 230,000 CFP certificants in 28 regions; the majority of these professionals are in the U.S., China, Japan, Canada and Brazil. As at 31 December 2025, Hong Kong had approximately 3,465 CFP certificants.

At present, IFPHK has 5,863 members in Hong Kong including 1,088 Qualified Retirement Adviser (QRA) holders; and represents financial planning practitioners in diverse professional backgrounds such as banking, insurance, independent financial advisory, stock broking, accounting, and legal services.

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香港財務策劃師學會
INSTITUTE OF FINANCIAL PLANNERS OF HONG KONG

For Media Enquiries

Ms. Agnes Lee

Tel: (852) 2982 7875

Email: agneslee@ifphk.org

Ms. Cally Wong

Tel: (852) 2982 7863

Email: callistawong@ifphk.org