

For immediate release

Press Release

**Institute of Financial Planners of Hong Kong and The Education University of Hong Kong
Sign Memorandum of Understanding
to Nurture Financial Talents for Hong Kong and Macau**

(Hong Kong/Macau – 3 July 2025) The Institute of Financial Planners of Hong Kong (IFPHK) and The Education University of Hong Kong (EdUHK) signed a Memorandum of Understanding (MoU) on 2 July to commence a three-year partnership, marking the beginning of a collaborative effort to enhance the financial planning profession. This partnership aims to elevate professional standards through the integration of academic and institutional resources, broaden pathways for CFP certification, promote a diversified qualification framework, deepen collaboration among research, academic and industry sectors and establish a long-term strategic alliance. This initiative addresses the evolving needs of the financial sector and seeks new momentum to drive its growth.

The signing ceremony took place on EdUHK's Tai Po campus, officiated by Professor John Lee Chi-Kin, President of EdUHK and Dr Paris Yeung, CEO of IFPHK. The ceremony was also attended by Professor Susanna Yeung Siu-sze, Acting Vice President (Academic) and Associate Vice President (Quality Assurance), Ms Helen Gai Huixia, Associate Vice President (Mainland Engagement and Development), Professor Li Wai-keung, Dean of Faculty of Liberal Arts and Social Sciences (FLASS), and Mr Edmond Kuo-hoi, Director of Finance of EdUHK; as well as Mr Edwin Cheung, Chairman and Dr Keith Yu, Vice Chairman (Development) of IFPHK.

In his remarks, Mr. Edwin Cheung, Chairman of IFPHK said, "This collaboration with EdUHK holds special significance as we celebrate IFPHK's 25th anniversary this year. It exemplifies a seamless exchange between academia and practice. Graduates of the Master of Arts in Personal Finance Education will directly meet the education requirement for CFP certification, paving an ideal career path for our emerging talents. Additionally, this collaboration expands the spectrum of the education framework. The upcoming Bachelor of Arts (Honors) in Personal Finance will further complement the talent pipeline for the financial planning industry. We are especially grateful to EdUHK Professor John Lee, President of EdUHK, for his exceptional leadership to enhance Hong Kong's position as a global wealth management center.

He continued, "The CFP certification is recognized as the world's most authoritative financial planning qualification, known for its stringent '4E' requirement: education, examination, experience and ethics. As the sole licensing body in Hong Kong and Macau authorized by the Financial Planning Standards Board Limited, IFPHK has nurtured nearly 3,600 certificants. Globally, CFP professionals are present across 28 economies, exceeding 230,000 professionals. This underscores the international recognition of the certification."

EdUHK President Professor John Lee Chi-Kin said that the University was focused on ‘Education Futures, Diverse Talents’ as its strategic development. Over the years, the University has had a long-standing commitment to academic development and talent cultivation in personal finance and financial education. In response to the rising demand for personal finance specialists, the University pioneered Hong Kong's first Bachelor of Arts (Honours) in Personal Finance and Master of Arts in Personal Finance Education programmes, both dedicated to personal and family financial planning and wealth management.

“The collaboration with IFPHK will further align EdUHK’s personal finance programmes with the internationally recognised CFCERTIFIED FINANCIAL PLANNER® certification standards, supporting the University’s strategic development on professional and vocational education (PVE). This partnership underscores the financial services sector’s recognition and trust in EdUHK’s academic quality assurance and demonstrates EdUHK’s commitment to active community engagement and partnerships. Looking ahead, EdUHK will continue to maintain close collaboration with the field and professional institutions, to enhance financial literacy and jointly promote the realization of sustainable development goals,” Professor Lee said.

About IFPHK’s CFP Certification: <https://shorturl.at/TTRN6>

About EdUHK’s Bachelor of Arts (Honors) in Personal Finance: <https://shorturl.at/pB4ej>

About EdUHK’s Master of Arts in Personal Finance Education: <https://shorturl.at/0hKF8>

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 and Macau authorized by the 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 countries/regions; the majority of these professionals are in the U.S., Canada, China, Australia and Japan, with approximately 3,600 CFP certificants in Hong Kong.

IFPHK has 6,700 members in Hong Kong including 1,200 Qualified Retirement Adviser (QRA) holders; and represents financial planning practitioners in diverse professional backgrounds such as banking, insurance, independent financial advisory, stock trading, accounting, and legal services.

About CFP Certification

CFP certification is the global symbol of excellence in financial planning and represents financial planners who commit to standards of competency and ethics, and to putting clients’ interests first. The CERTIFIED FINANCIAL PLANNER credential represents financial planning professionals who commit to better serving their clients through rigorous international standards, ethical practices and lifelong learning.

Media Enquiries

Ms. Agnes Lee

Tel: (852) 2982 7875

Email: agneslee@ifphk.org

Ms. Cally Wong

Tel: (852) 2982 7863

Email: callistawong@ifphk.org



Photo 1:

The IFPHK and The Education University of Hong Kong (EdUHK) officially sign a Memorandum of Understanding (MOU) (2 July 2025).

The signing ceremony officiated by Professor John Lee Chi-Kin, President of EdUHK and Dr. Paris Yeung, CEO of IFPHK.



Photo 2:

Representatives from the pair attend the ceremony.



Photo 3:

Professor John Lee Chi-Kin, President of EdUHK delivers welcome remarks at the signing ceremony.



Photo 4:

Mr. Edwin Cheung, Chairman of IFPHK delivers welcome remarks at the signing ceremony.



Photo 5 and 6

EdUHK President Professor John Lee Chi-Kin presents a souvenir to IFPHK Chairman Mr. Edwin Cheung and CEO Dr. Paris Yeung

IFPHK Chairman Mr. Edwin Cheung and CEO Dr. Paris Yeung present a souvenir to EdUHK President Professor John Lee Chi-Kin and Associate Vice President (Quality Assurance) Professor Susanna Yeung Siu-sze.



Photo 7

Representatives from the pair attend the ceremony.

