

*Immediate Release*

**Press Release**

**IFPHK and CPA Australia Forge Strategic Development of Well-rounded Professionals in Hong Kong and Macau**

(Hone Kong/ Macau – 26 June 2025) The Institute of Financial Planners of Hong Kong (IFPHK) and CPA Australia have officially signed a Memorandum of Understanding (MOU) to establish a strategic partnership focused on talents cultivation and cross-qualification recognition. This collaboration aims to nurture well-rounded financial professionals to strengthen the talent pool in Hong Kong and Macau.

The signing ceremony was officiated by Dr Paris Yeung, CEO of IFPHK and Dr Josh Heniro, Head of Global Growth of CPA Australia. The event was witnessed by Mr Edwin Cheung, Chairman of IFPHK and Ms Karina Wong FCPA (Aust.), 2025 Divisional President – Greater China of CPA Australia. The collaboration between two highly-regarded professional institutes, represents a significant step forward in aligning accounting and financial planning expertise to cultivate globally competitive professionals in the regions.

In his opening remarks, Mr Edwin Cheung, Chairman of IFPHK stated, “To maintain Hong Kong’s leadership as an international financial hub and therefore foster a long-term development of its financial industry, expanding and enhancing our talent base is essential. With the rapid development of emerging sectors such as the Greater Bay Area, the Wealth Management Connect Scheme and Green Finance, Hong Kong’s financial industry is gaining momentum and poised for greater influence. At the same time, our unique role as both a powerhouse for China’s economy and a gateway to the world presents unprecedented opportunities and challenges.”

He continued, “The question is: how can talents in Hong Kong and Macau tap into this evolving landscape. In today’s dynamic society, professionals must be versatile and equipped with a diverse range of skills. A true talent is not defined by a single specialty, but by the ability to perform across disciplines, by that means, a well-rounded professional who can meet global demands.”

Ms Karina Wong, 2025 Divisional President – Greater China of CPA Australia. commented, “The theme of CPA Australia’s 70<sup>th</sup> anniversary in Hong Kong is 'Connect, Collaborate, Contribute and Celebrate. Our collaboration is a felicitous reflection of this theme. It not only reflects the alignment of our values and visions but also signifies our commitment to breaking down professional boundaries and thereby promoting deep and meaningful cooperation of the accounting and financial planning fields.”

She continued, “This strategic collaboration focuses on three key aspects: enhancing professional development through joint programs; deepening knowledge exchange between the fields of accounting and financial planning; and providing fast-track pathways for members to obtain multiple professional qualifications and therefore to broaden their professional perspectives and networks. We believe this collaboration will strengthen our professional ties, cultivate talents with cross-sector expertise, and ultimately meet market demands for well-rounded professionals.”

Under the terms of the MOU, IFPHK members in Hong Kong and Macau who meet the entry requirements of CPA Australia might be eligible to apply to become CPA Australia members through the streamlined “Executive Leadership Pathway”. Conversely, CPA Australia members can access the “Lists of Fast-Track to CFP certification (List D)” and sit in directly for CFP Certification Examination (Advanced Level Paper 1 and 2). Upon passing, they will be granted the CFP certification.

CPA Australia’s “Executive Leadership Pathway”:

<https://www.cpaaustralia.com.au/become-a-cpa/starting-the-cpa-program/executive-leadership-pathway>

IFPHK’s “Lists of Fast-Track to CFP Certification” – List D:

[http://www.ifphk.org/AFPWeb/pdf/List\\_of\\_Challenge\\_Status\\_Eng.pdf](http://www.ifphk.org/AFPWeb/pdf/List_of_Challenge_Status_Eng.pdf)

### **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 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 CPA Australia**

CPA Australia is Australia’s leading professional accounting body and one of the largest in the world. We have more than 175,000 members in over 100 countries and regions. Our core services include education, training, technical support and advocacy. CPA Australia provides thought leadership on local, national and international issues affecting the accounting profession and public interest. We engage with governments, regulators and industries to advocate policies that stimulate sustainable economic growth and have positive business and public outcomes. Find out more at [cpaaustralia.com.au](http://cpaaustralia.com.au)

### **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

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### Photo 1:

IFPHK and CPA Australia officially signed a Memorandum of Understanding (MOU) today (24 June 2025).

Mr Edwin Cheung, Chairman of IFPHK, Dr Paris Yeung, CEO of IFPHK, Dr Josh Heniro, Head of Global Growth of CPA Australia and Ms Karina Wong FCPA (Aust.), 2025 Divisional President – Greater China of CPA Australia attended the MOU Signing Ceremony.



### Photo 2:

IFPHK and CPA Australia jointly hosted the Fireside Chat on "Investment Strategy in Tariff Turmoil and Market Outlook in Next Half 2025"

The fireside chat is moderated by Mr Edwin Cheung, Chairman of IFPHK. Guest speakers include Mr Cliff Ip, Divisional President 2024 – Greater China and Dr Paris Yeung, CEO of IFPHK.



### Photo 3:

"Investment Strategy in Tariff Turmoil and Market Outlook in Next Half 2025" cum IFPHK x CPA Australia MOU Signing Ceremony received enthusiastic support from members of IFPHK and CPA Australia.



### Photo 4:

IFPHK Board Members and CPA Australia Councilors took a group picture.