

For immediate release

Press Release

The IFPHK Hosting the 9th Annual World Financial Planning Day with FPSB To Help People Build Brighter Futures

(Hong Kong/Macau – 8 July 2025) The Institute of Financial Planners of Hong Kong (IFPHK) announced that it will host the 9th annual World Financial Planning Day in Hong Kong, as a support to the Financial Planning Standards Board (FPSB) initiatives during the International Organization of Securities Commissions' (IOSCO) World Investor Week. The World Financial Planning Day is set as Wednesday, 8 October, 2025.

This global event leverages the talents and skills of more than 230,000 CFP professionals worldwide to highlight the pivotal role financial planning plays in empowering people to take control of their financial well-being by raising awareness of the value of working with CFP Certified Financial Planner or related professionals.

IFPHK CEO Dr Paris Yeung said: *“As we mark IFPHK’s 25th anniversary this year, we reflect on our unwavering commitment to advancing financial planning excellence in Hong Kong, Macau, and beyond. For a quarter-century, IFPHK has championed professionalism, education, and ethical standards to empower individuals and communities. Hosting World Financial Planning Day alongside FPSB is a testament to our shared mission—today and for the next 25 years—to foster financial resilience and confidence worldwide.”*

“Celebrated across continents, World Financial Planning Day shines a spotlight on the power of financial planning and of working with a financial planner who has committed to rigorous standards of professionalism and to putting clients’ interests first,” said FPSB CEO Dante De Gori, CFP. “Research shows people who work with a financial planner, like a CFP professional, report a higher quality of life, more financial confidence and resilience, and more financial satisfaction* – World Financial Planning Day is the perfect occasion for all to discover why.”

Last year, the campaign achieved an estimated global audience reach of more than 580 million people through media coverage, financial education events and social media as 20 territories around the world united to celebrate World Financial Planning Day. Building on this success, the 2025 campaign will include a variety of educational activities across the globe to raise awareness of the value of financial planning. Events and programs will be featured on the WFPD website in September.

“Around the world, our network of organizations and CFP professional community are uniting with a shared purpose – to empower people to take control of their financial well-being, now and in the future. Through coordinated financial education events and outreach efforts, we are championing the value of financial planning and helping individuals make confident, informed decisions that lead to better lives,” added De Gori. “We look forward to hosting our ninth annual World Financial Planning Day, alongside IOSCO’s World Investor Week, to raise awareness of the wide-ranging benefits of financial planning.”

Rodrigo Buenaventura, IOSCO Secretary General said: "Financial education is the foundation for making informed financial and investment decisions that support life goals. We're pleased to support World Financial Planning Day in partnership with IOSCO's World Investor Week to help individuals discover the value of financial planning, build essential skills, and enhance investor resilience and protection."

"We value our longstanding collaboration with FPSB in support of World Financial Planning Day, a key initiative of IOSCO's World Investor Week," said Chair of IOSCO's Committee on Retail Investors Camille Beaudoin. "Together, our efforts are helping individuals around the world gain the knowledge and skills needed to strengthen financial resilience and invest confidently in their future."

More information about World Financial Planning Day and World Investor Week is available on worldfpday.org and worldinvestorweek.org and by joining the #WFPD2025 and #IOSCOWIW2025 conversations on LinkedIn, Facebook, Twitter, Instagram and YouTube.

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 FPSB Ltd.

FPSB manages, develops and operates certification, education and related programs to benefit the global community by establishing, upholding and promoting worldwide professional standards in financial planning. FPSB demonstrates its commitment to excellence with the marks of professional distinction – CFP, CERTIFIED FINANCIAL PLANNER and – which it owns internationally. FPSB and our global network of organizations certify CFP professionals in 28 territories. CFP professionals reside in Australia, Austria, Brazil, Brunei, Canada, Chinese Taipei, Colombia, France, Germany, Hong Kong, India, Indonesia, Ireland, Israel, Italy, Japan, Macau, Malaysia, the Netherlands, New Zealand, People's Republic of China, Republic of Korea, Singapore, South Africa, Switzerland, Thailand, the United Kingdom and the United States. There are over 230,000 CFP professionals worldwide. For more, visit fpsb.org.

FPSB owns the CFP, CERTIFIED FINANCIAL PLANNER and (the CFP Marks) outside the United States, and permits qualified individuals to use the marks to indicate that they meet FPSB's initial and ongoing certification standards and requirements. CFP professionals may use the CFP marks in the territory or region in which they are certified.

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.

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