



IFPHK FINANCIAL PLANNING CONFERENCE 2025

Embark on a journey of insightful sharing on the financial industry, brought to you by financial experts, regulators and government officials. Join us on 9 September at the HKCEC.

DETAILS

Date : 9 September 2025(Tue)
Time : 9:15am – 5:15pm
Venue: Meeting Room N101, HKCEC
Language : Cantonese
(unless specified)

CE HOURS

- 5.5 IFPHK CE Hours (including 1 compliance and/or ethics hour)
- 5.5 SFC CPT Hours
- 5.5 MPFA Non-core CPD Hours
- 2025 Designated CE course for QRA holders (3 hours)
- 2 IA CPD Hours*

*Subject to final approval

TOPIC HIGHLIGHTS

- Regulatory updates
- Market leaders forum
- Future of AI in financial planning
- Opportunities and challenges of stablecoins
- Planning for inheritance and retirement

SUPER EARLY BIRD DISCOUNT

Member: \$880 (Reg. Fee \$1,480)
Non-member: \$1,380 (Reg. Fee \$2,180)
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SPEAKERS

IFPHK CHAIRMAN



01

FPSB CEO



02

KEYNOTE SPEAKERS



03



04

GUEST SPEAKERS



05



06



07



08



09

(Exciting speakers are on the way – stay tuned for updates)

01. **Mr. Edwin Cheung, CFP®**
Chairman
Institute of Financial Planners
of Hong Kong

02. **Mr. Dante De Gori, CFP®**
Chief Executive Officer
Financial Planning Standards
Board Ltd. (FPSB)

03. **Mr. Joseph Chan, JP**
Under Secretary for Financial
Services and the Treasury
The Government of the HKSAR

04. **Ms. Cynthia Hui**
Chief Operating Officer and
Executive Director
Mandatory Provident Fund
Schemes Authority

05. **Ms. Ka Shi Lau**
Chairman
Hong Kong Trustees'
Association

06. **Mr. Tony Mak, CFP®**
Senior District Director
AIA Group Limited

07. **Mr. Paul Pong, CFP®**
Former chairman and current
board member
Institute of Financial Planners
of Hong Kong

08. **Mr. Chris Tse, CFP®**
Former chairman and current
board member
Institute of Financial Planners
of Hong Kong

09. **Ms. Steffanie Yuen**
Managing Director and
Head of Hong Kong
Endowus

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