

FOR IMMEDIATE RELEASE

**IFPHK Financial Education and ESG Leadership Awards Cum
Accredited Professional Financial Planning Firm 2024
Uniting the Pinnacle of Financial Education Brilliance with 11 Companies Accoladed**

(Hong Kong – 2 December, 2024) Organized by the Institute of Financial Planners of Hong Kong (IFPHK), the “IFPHK Financial Education and ESG Leadership Awards cum Accredited Professional Financial Planning Firm 2024” Awards Presentation Ceremony took place at JW Marriott Hong Kong on 27 November 2024. Over 100 prestigious guests from the government, regulatory, industry and nonprofit making sectors were seen at the occasion to celebrate collective effort in pro bono financial education. The awards recognized 11 companies, with four corporates crowned the highest honor “Best Corporate Financial Education and ESG Leadership of the Year”. They are AIA International Limited, Bank of Communications (Hong Kong) Limited, Chow Tai Fook Life Insurance Company Limited and FWD Life Insurance Company (Bermuda) Limited.

The Ceremony was honored to have Mr. Joseph Chan, JP, Under Secretary of Financial Services and the Treasury, HKSAR as the Guest-of-Honor. Mr. Andrew Wan, Chief Financial Officer of Securities and Futures Commission, Mr. Wallace Lau, Chief Corporate Affairs Officer and Executive Director of The Mandatory Provident Fund Schemes Authority and Mr. Kelvin Lee, Chief Operating Officer of HKMC Annuity Limited also graced the ceremony as presenters.

Mr. Edwin Cheung, Chairman of IFPHK, commenced with a welcome speech. Themed “Uniting the Pinnacle of Financial Education Brilliance”, the Awards aim to gather and maximize efforts of financial education. He highlighted that with market volatility and new investment opportunities emerging daily, the need for solid financial education has never been greater. It is known that financial education and ESG work often takes time to show results, which is why the IFPHK created these awards - to recognize the companies’ ongoing dedication.

At the same time, he also reinstated that IFPHK promotes best practices and ethical standards through the CFP certification, which connects Hong Kong’s financial planner to a global network of nearly 223,700 financial planning professionals. With the offering of the “Accredited Professional Financial Planning Firm”, the recognition encourages companies and their staff to attain the global qualification that will ultimately help to strengthen consumer protection for the community.

The Awards was keenly supported by 13 supporting organizations, namely the Insurance Authority, Investor and Financial Education Council, Mandatory Provident Fund Schemes Authority, Financial Services Development Council, The Hong Kong Mortgage Corporation Limited, CFA Society Hong Kong, The Hong Kong Association of Banks, Hong Kong Institute of Bankers, Hong Kong Institute of Certified Public Accountants, Hong Kong Investment Funds Association, Hong Kong Investor Relations Association, The Hong Kong Management Association and the Kowloon Chamber of Commerce.

**IFPHK Financial Education and ESG Leadership Awards
Cum Accredited Professional Financial Planning Firm 2024**

Best Corporate Financial Education and ESG Leadership of the Year
AIA International Limited
Bank of Communications (Hong Kong) Limited
Chow Tai Fook Life Insurance Company Limited
FWD Life Insurance Company (Bermuda) Limited
Corporate Financial Education and ESG Leadership – Gold Award
AIA International Limited
Bank of Communications (Hong Kong) Limited
Chow Tai Fook Life Insurance Company Limited
FWD Life Insurance Company (Bermuda) Limited
Hang Seng Bank
Hong Kong Family Welfare Society Financial Education Centre
Prudential Hong Kong Limited
Shanghai Commercial Bank Limited
The Education University of Hong Kong
The Hang Seng University of Hong Kong
Tung Wah Group of Hospitals Healthy Budgeting Family Debt Counselling Centre
Accredited Professional Financial Planning Firm
AIA International Limited
Bank of Communications (Hong Kong) Limited
FWD Life Insurance Company (Bermuda) Limited
Prudential Hong Kong Limited



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

About IFPHK

IFPHK was established in June 2000 as a non-profit professional organization. It aims to be recognised in the region as a premier professional body representing financial planners dedicated to upholding the highest professional standards for the benefit of the public. The Institute is the sole licensing professional body in Hong Kong authorised by the Financial Planning Standards Board Limited in the US to grant CFP® certification and AFP® certification to qualified financial planning professionals in Hong Kong and Macau. Currently, there are more than 223,700 CFP certificants in 27 countries/regions; the majority of these professionals are in the U.S., Canada, China, Australia and Japan, and approximately 3,800 CFP certificants are in Hong Kong. It represents 6,700 financial planning practitioners in Hong Kong, including 1,200 Qualified Retirement Adviser. They are from such diverse professional backgrounds as banking, insurance, independent financial advisory, stockbroking, accounting, and legal services.

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1		<p>超過 100 名嘉賓見證得獎者的誕生。</p> <p>Over 100 guests celebrated financial education and financial planning excellence at the Awards Presentation Ceremony.</p>
2		<p>財經事務及庫務局副局長陳浩濂先生,太平紳士擔任主禮嘉賓，他於台上祝賀各獲獎機構並感謝它們對社區理財教育的支持。</p> <p>Mr. Joseph Chan, JP, Under Secretary of Financial Services and the Treasury, The Government of the Hong Kong SAR, graced the Ceremony as the Guest-of-Honor. He congratulated the award-winning companies and appreciated for their financial education contribution to the community.</p>
3		<p>香港財務策劃師學會主席張言銘先生於致歡迎辭時特別表揚各得獎機構的無私奉獻，身體力行提高市民的理財意識。</p> <p>The Ceremony commenced with a welcome speech delivered by Mr. Edwin Cheung, Chairman of IFPHK. He gave high regards to all awardees for their selfless contribution in raising financial literacy of the community.</p>

4	 <p>The image shows a man in a dark suit presenting a trophy to a woman in a dark dress. They are standing on a stage in front of a large screen. The screen displays the 'TIPPIK FINANCIAL EDUCATION AND ESG LEADERSHIP Awards 2024' logo and the text 'cum Accredited Professional Financial Planning Firm 2024 AWARDS PRESENTATION CEREMONY'.</p>	<p>友邦保險(國際)有限公司獲選為「年度最佳企業理財教育及 ESG 領袖」，企業代表從財經事務及庫務局副局長陳浩濂先生,太平紳士手中接過獎座。</p> <p>AIA International Limited was awarded as the “Best Corporate Financial Education and ESG Leadership of the Year”. Mr. Joseph Chan, JP, Under Secretary of Financial Services and the Treasury, HKSAR, presented the trophy to the award representative.</p>
5	 <p>The image shows a man in a dark suit presenting a trophy to a woman in a patterned top and dark skirt. They are standing on a stage in front of a large screen. The screen displays the 'TIPPIK FINANCIAL EDUCATION AND ESG LEADERSHIP Awards 2024' logo and the text 'cum Accredited Professional Financial Planning Firm 2024 AWARDS PRESENTATION CEREMONY'.</p>	<p>交通銀行(香港)有限公司獲選為「年度最佳企業理財教育及 ESG 領袖」，企業代表從財經事務及庫務局副局長陳浩濂先生,太平紳士手中接過獎座。</p> <p>Bank of Communications (Hong Kong) Limited was awarded as the “Best Corporate Financial Education and ESG Leadership of the Year”. Mr. Joseph Chan, JP, Under Secretary of Financial Services and the Treasury, HKSAR, presented the trophy to the award representative.</p>
6	 <p>The image shows a man in a dark suit presenting a trophy to a woman in a dark blazer and light-colored trousers. They are standing on a stage in front of a large screen. The screen displays the 'TIPPIK FINANCIAL EDUCATION AND ESG LEADERSHIP Awards 2024' logo and the text 'cum Accredited Professional Financial Planning Firm 2024 AWARDS PRESENTATION CEREMONY'.</p>	<p>周大福人壽保險有限公司獲選為「年度最佳企業理財教育及 ESG 領袖」，企業代表從財經事務及庫務局副局長陳浩濂先生,太平紳士手中接過獎座。</p> <p>Chow Tai Fook Life Insurance Company Limited was awarded as the “Best Corporate Financial Education and ESG Leadership of the Year”. Mr. Joseph Chan, JP, Under Secretary of Financial Services and the Treasury, HKSAR, presented the trophy to the award representative.</p>

7		<p>富衛人壽保險(百慕達)有限公司獲選為「年度最佳企業理財教育及 ESG 領袖」，企業代表從財經事務及庫務局副局長陳浩濂先生,太平紳士手中接過獎座。</p> <p>FWD Life Insurance Company (Bermuda) Limited was awarded as the “Best Corporate Financial Education and ESG Leadership of the Year”. Mr. Joseph Chan, JP, Under Secretary of Financial Services and the Treasury, HKSAR, presented the trophy to the award representative.</p>
8		<p>主禮嘉賓、頒獎嘉賓及學會代表合照。</p> <p>左起： 香港財務策劃師學會考試委員會成員鄭子云教授、香港財務策劃師學會前主席李澄幸先生、香港財務策劃師學會前主席龐寶林先生、香港財務策劃師學會行政總裁劉振輝先生、香港年金有限公司首席營運總監李若麒先生、證券及期貨事務監察委員會（證監會）首席財務總監溫志遙先生、財經事務及庫務局副局長陳浩濂先生,太平紳士、強制性公積金計劃管理局（積金局）機構事務總監及執行董事劉家麒先生、香港財務策劃師學會主席張言銘先生、香港財務策劃師學會前主席麥永光先生、香港財務策劃師學會前主席謝汝康先生、香港財務策劃師學會副主席（發展）余碩衡博士。</p> <p>Guest-of-Honor, award presenters and IFPHK representatives on stage.</p> <p>(From left) Prof. Louis Cheng, Exam Committee Member of IFPHK; Mr. Ray Lee, Former Chairman of IFPHK; Mr. Paul Pong, Former Chairman of IFPHK; Mr. Dennis Lau, CEO of IFPHK; Mr. Kelvin Lee, Chief Operating Officer of HKMC Annuity Limited; Mr. Andrew Wan, Chief Financial Officer of the Securities and Futures Commission; Mr. Joseph Chan, JP, Under Secretary for Financial Services and the Treasury, The Government of the Hong Kong SAR; Mr. Wallace Lau, Chief Corporate Affairs Officer and Executive Director of the Mandatory Provident Fund Schemes Authority; Mr. Edwin Cheung, Chairman of IFPHK; Mr. Tony Mak, Former Chairman of IFPHK; Mr. Chris Tse, Former Chairman of IFPHK; Dr. Keith Yu, Vice Chairman (Development) of IFPHK.</p>

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「企業理財教育及 ESG 領袖」及「優質財策企業」的得獎代表與頒獎嘉賓大合照。

Winners of the "Corporate Financial Education and ESG Leadership " and "Accredited Professional Financial Planning Firm" gathered with the presenters for a group photo.