

Partnership Packages for IFPHK Financial Planning Conference 2026



Repositioning Wealth:
Cross-Border Planning and
Retirement Sustainability



About IFPHK

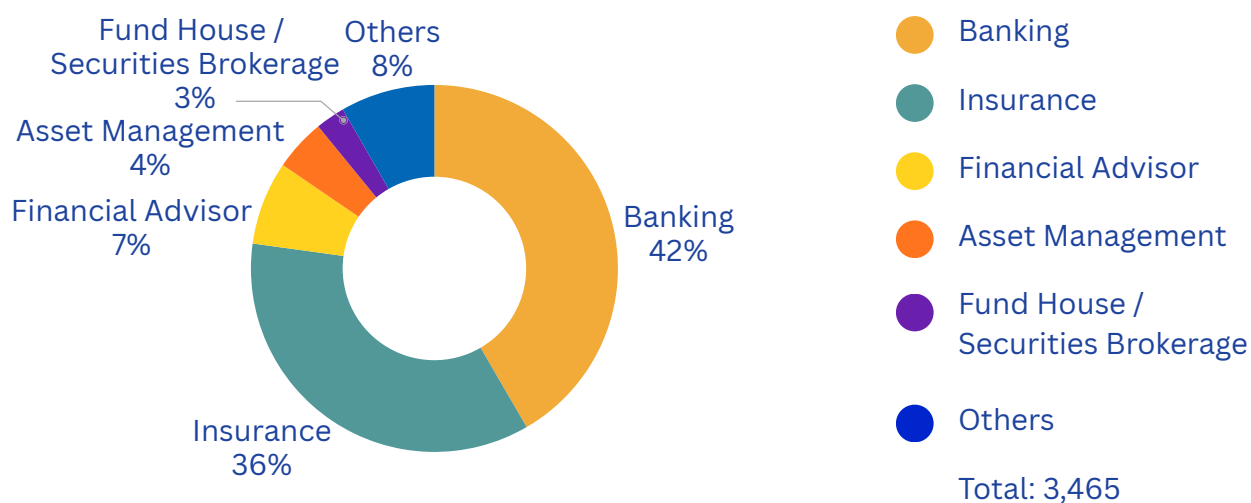


IFPHK was established in June 2000 as a non-profit organization for the fast-growing financial industry. It aims to be recognized in the region as the premier professional body representing financial planners that uphold the highest standards to benefit the public. The Institute is the sole licensing body in Hong Kong authorized by 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.

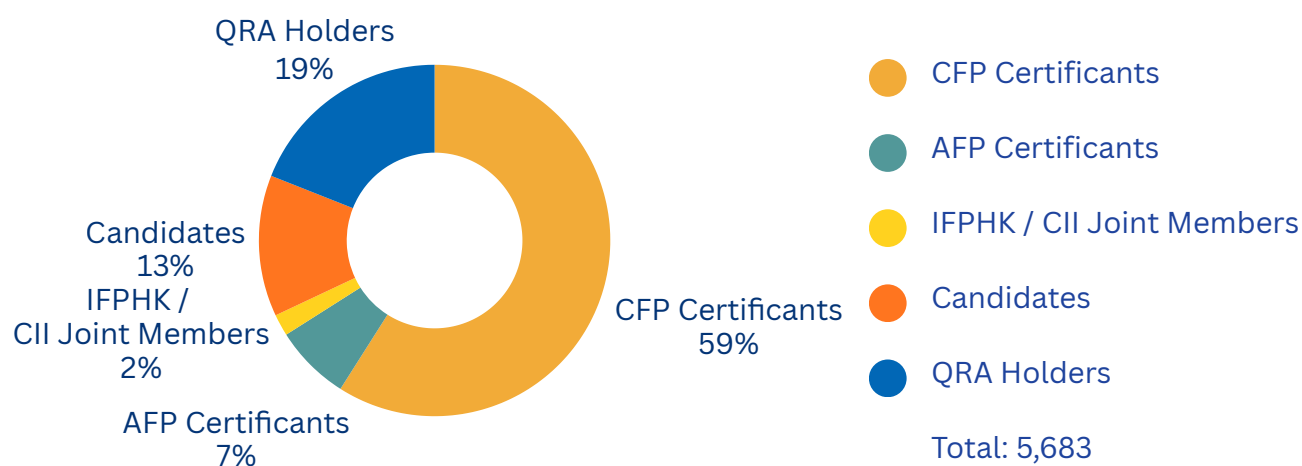
Currently there are more than 230,000 CFP certificants in 28 regions; the majority of these professionals are in the U.S., China, Japan, Canada and Brazil, with approximately 3,465 CFP certificants in Hong Kong. Currently, IFPHK has 5,683 members in Hong Kong including 1,200 Qualified Retirement Adviser (QRA) holders; and represents financial planning practitioners in diverse professional backgrounds such as banking, insurance, independent financial advisory, stock broking, accounting, and legal services.

IFPHK Membership

Composition of CFP Certificants



Number of Members



IFPHK Membership

Founding Members (Total: 30)

- ACE Life Insurance Company Limited
(now Chubb Life Insurance Hong Kong Limited)
- Ageas Insurance Company (Asia) Limited
(now Chow Tai Fook Life Insurance Company Limited)
- AllianceBernstein Hong Kong Limited
- Altruist Financial Group Limited
- American Express Bank Limited
- AIA International Limited
- AXA China Region Insurance Company Limited
- Bank of China (Hong Kong) Limited
- BNP Paribas Private Bank
(now BNP Paribas Wealth Management Asia Limited)
- Charles Schwab, Hong Kong, Limited
- China Construction Bank (Asia) Corporation Limited.
- Citibank (Hong Kong) Limited
- DBS Bank (Hong Kong) Limited
- Fidelity Investments Management (Hong Kong) Limited
- Franklin Templeton Investments (Asia) Limited
- General Agents and Managers Association of Hong Kong Limited
- Hang Seng Bank Limited
- INVESCO Hong Kong Limited
- Manulife (International) Limited
- MLC (Hong Kong) Limited
(now AXA Asia Pacific Holdings Limited)
- Morgan Stanley Dean Witter Asia Limited
(now Morgan Stanley Asia Limited)
- Pegasus Fund Managers Ltd.
- Prudential Hong Kong Limited
- Old Mutual International Life Assurance Limited
(now Utmost International Isle of Man Limited)
- Sun Life Hong Kong Limited
- T G Holborn (Hong Kong) Limited
- The Hongkong and Shanghai Banking Corporation Limited
- The Life Underwriters Association of Hong Kong Limited
- UBS AG
- Zurich Life Insurance Company Limited

Corporate Members* (Total: 33)

- AIA International Limited
- AIA Company (Trustee) Limited c/o AIA International Limited
- Altruist Financial Group Limited
- AMG Financial Group Limited
- AXA China Region Insurance Company Limited
- Bank of Communications (Hong Kong) Limited
- Best Managed Wealth Ltd
- BOC Group Life Assurance Company Limited
- BS Wealth Management Limited
- China CITIC Bank International Limited
- China Life Insurance (Overseas) Co. Ltd.
- China Taiping Life Insurance (Hong Kong) Company Limited
- Chow Tai Fook Life Insurance Company Limited
- City University School of Continuing and Professional Education
- Endowus HK Limited
- FWD Life Insurance Company (Bermuda) Limited
- Hang Seng Bank Limited
- Hansui Capital Company Limited
- HKU School of Professional and Continuing Education
- Hong Kong Life Insurance Limited
- Invesco Hong Kong Limited
- Macao Institute for Tourism Studies
- Manulife (International) Limited
- Noble Apex Wealth Limited
- Pegasus Fund Managers Limited
- Private Client Services by Mercer Limited
- Prudential Hong Kong Limited
- School of Liberal Arts, Macau University of Science and Technology
- Sun Life Hong Kong Limited
- The Bank of East Asia, Limited
- Venhouse Financial Planning Ltd
- Waterdrop Financial Services (HK) Limited
- WRISE Financial Services Limited

**as at end of January 2026*

IFPHK Financial Planning Conference 2026

 **3 September 2026**

 **9:15 am – 5:15 pm**

 **N101, HKCEC**

 **250+ delegates**

The annual Financial Planning Conference is the Institute's premier flagship event and a cornerstone of its mission to elevate the standards of the financial planning profession. Bringing together influential leaders, regulatory bodies, and nearly 400 CFP professionals and financial services practitioners each year, the Conference serves as a dynamic platform to explore the latest trends and insights shaping the financial planning landscape. Through this highly anticipated event, the Institute delivers valuable perspectives and inspiration to practitioners while fostering meaningful industry dialogue. The Institute also welcomes collaboration with sponsors and speakers and remains flexible in tailoring the programme to align with the evolving needs and interests of its stakeholders and audience.



The premier event for financial planning



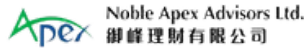
The flagship conference brings together influential leaders to discuss the latest trends and insights shaping the financial planning landscape

Previous Participation

Previous Supporting Organizations



Previous Sponsoring Organizations



Previous Conference 2025

The Financial Planning Conference 2025 was successfully held on 9 September 2025 at the Hong Kong Convention and Exhibition Centre. Under the theme “Connecting the World for 25 Years, Powering a Sustainable Financial Planning Future,” the Conference attracted over 300 participants and featured more than 20 distinguished speakers, including government officials, regulators, financial experts and industry leaders. They shared insights on key topics such as talent development for wealth management, the application of artificial intelligence in financial planning, succession and retirement planning, and the latest developments in digital assets. The Conference received an overwhelmingly positive response from the financial services industry, marking a significant milestone in celebration of IFPHK’s 25th anniversary.



Sponsorship Opportunities

	Options	Amount HK\$49,800
Pre-Event		
1	Logo recognition on the dedicated conference website	✓ Regular Logo
2	Logo recognition/ name mentioning in promotional materials including e-flyer and e-blasts to IFPHK members and non-members	✓
3	Logo recognition / name mentioning on conference's social media feeds, such as Facebook, LinkedIn and IG	✓
4	Hashtag Sponsors' Facebook pages/ IG/ LinkedIn accounts to conference social media feeds (boosted or regular feeds)	✓
Onsite		
5	Complimentary tickets x 10 Valued HK\$21,800	10
6	Logo exposure on all on-site display (backdrops, conference room, brochure, registration counter, projector screen, etc)	✓ Regular Logo
7	Opportunity for company executive to speak at conference (Depending on topic suitability & availability; on a first-come, first-served basis)	✓
8	Verbal acknowledgement by MC	✓
9	Premium display table (on a first-come, first-served basis)	✓
Post-Event		
10	Complimentary advertisement in digital version of IFPHK Newsletter Valued HK\$12,000	Full-page, 4C
11	Logo recognition / name mentioning in event recaps released via members' communication channels and social media posts	✓

IFPHK Financial Planning Conference 2026

Sponsorship Reply Form

Ms. Agnes Lee

Tel: 2982 7875

Email: agneslee@ifphk.org

Our sponsorship packages are designed to offer you greater flexibility and better value for money. Your participation is important and will no doubt add to the success of this event. Take advantage of the numerous benefits and book early to avoid disappointment!

SPONSORSHIP PACKAGE

Sponsor – HK\$49,800

Company : _____

Contact person : _____

Position : _____

Address : _____

Telephone No. : _____

Email address : _____

To confirm the above sponsorship, please sign at below duly with the company chop, and return a copy to the IFPHK by email to agneslee@ifphk.org.

Confirmed and Agreed by

(Please sign with company chop)

Name:

Title:

Date:



Partner with us today!



Ms. Agnes Lee, Head of Corporate Communications & Marketing



agneslee@ifphk.org



2982 7875