

IFPHK
FINANCIAL EDUCATION AND ESG
LEADERSHIP
— Awards 2026 —

IFPHK
Financial Education and
ESG Leadership Awards 2026

**Excellence for Impact:
Financial Literacy
and ESG Leadership
for Tomorrow**



New Awards Category

Individual Financial Education and ESG Leadership



Organizer:



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Excellence for Impact: Financial Literacy and ESG Leadership for Tomorrow

The Institute of Financial Planners of Hong Kong (IFPHK) is proud to announce the launch of the annual “IFPHK Financial Education and ESG Leadership Awards 2026”, with this year's theme “Excellence for Impact: Financial Literacy and ESG Leadership for Tomorrow”. This year's Awards place a renewed focus on the powerful intersection of financial literacy and sustainable development, recognising those who are shaping a more financially capable and resilient future for Hong Kong through leadership in environmental, social, and governance practices.

In an era where economic well-being and sustainability are increasingly intertwined, financial education serves as a cornerstone for empowering individuals and communities to make informed decisions about their money, while ESG leadership ensures that businesses and organisations operate responsibly for the benefit of society and the planet. The 2026 Awards celebrate outstanding achievements that go beyond traditional financial education excellence—honouring commercial firms, NGOs, NPOs and individuals etc. who not only provide pro bono public financial education but also embed ESG principles into their operations, programmes, and community outreach.

At the heart of the Awards is our highest distinction, the “Best Corporate Financial Education and ESG Leadership of the Year.” This grandest honour recognises the most outstanding corporate awardee that has demonstrated excellence across financial education and ESG leadership, with strong, sustained impact on the community and the financial services sector. It reflects the highest standard of commitment, innovation, and leadership, and celebrates organisations that set a benchmark for others to follow.

We are also delighted to introduce a new recognition this year — the “Individual Financial Education and ESG Leadership” award. This special accolade celebrates visionary senior executives of corporate awardees who have demonstrated exceptional leadership in advancing financial education and ESG initiatives. By mobilising their organisations and teams to deliver meaningful and measurable impact, these leaders exemplify the power of strategic influence, commitment, and collaboration in driving sustainable change for the benefit of the community and the financial services sector.

By highlighting initiatives that combine financial education with sustainable practices, the Awards seek to inspire a new generation of leaders who understand that true impact lies in creating long-term value for both individuals and the broader community. Whether through educating vulnerable groups on financial resilience, promoting sustainable investing, or integrating ESG considerations into financial planning services, the 2026 awardees will exemplify how excellence in financial education and ESG leadership can drive meaningful, lasting change for Hong Kong's future.



A handwritten signature in black ink, appearing to read 'Paris Yeung' with a stylized flourish at the end.

Dr. Paris Yeung

*Chief Executive Officer
Institute of Financial Planners of Hong Kong*

About the Awards

The IFPHK was established in 2000 to develop and maintain high professional standards and self-discipline for providers of financial planning services in Hong Kong to ensure that consumers are well-served and their interests protected.

To align with the IFPHK's mission to increase awareness of the importance of financial planning, the IFPHK has launched the "IFPHK Financial Education Leadership Awards" (The "FELA") since 2018 to pay tribute to commercial firms, non-profit organizations, and individuals that have made significant efforts in improving financial literacy levels in Hong Kong.

Since its inauguration in 2018, 43 organizations and nearly 100 individuals have been lauded with the FELA as a hallmark of their devotion to financial education for the community. To encourage and honor achievements that address specific financial education needs, the award criteria will be finetuned as and when appropriate to move with the times.

Since 2022, ESG criteria has been added to FELA to deliver a stronger message of a sustainable mission of the awardees. It is hoped that by refreshing the Awards from time to time, it may reflect justly on the social needs and recognize the corporate leaders that constantly pick up and move on.

Objective

1. To recognize commercial firms, non-governmental organizations (NGOs), non-profit organizations (NPOs) such as schools, professional bodies, charities, social enterprises, etc. and individual in providing public financial education to the community on a pro bono basis
2. To promote the importance of financial planning in Hong Kong
3. To raise the overall level of financial literacy in Hong Kong

Eligibility

Open to all Hong Kong commercial firms and non-profit entities who have invested, undertaken, or completed their financial education tasks between 1 July 2025 and 30 June 2026. To be eligible for the Awards, firms must also fulfill the respective ESG achievement as specified.

Key Dates

4 AUG 2026 Open for Entries	30 SEP 2026 Application Deadline	20 OCT 2026 Results Announcement	NOV- DEC 2026 Awards Presentation Ceremony
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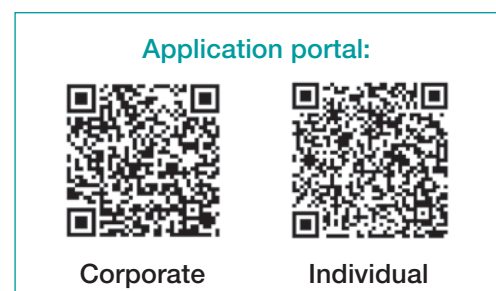
Assessment and Judges

The judging panel is comprised of the IFPHK's board members and experienced CFP® professionals.

Application

Applications should be submitted via the application portal together with supporting documents.

The submission deadline is 30 September 2026.



Corporate Financial Education and ESG Leadership



This Award aims to recognize collective efforts that commercial firms and non-profit entities have made to improve financial literacy in Hong Kong. All awardees are also determined in contributing to a sustainable city through efforts in ESG.

Award	Commercial Firms / Non-profit Entities	
Gold	Achieving 4 criteria or more	+ ESG Engagement Having 2 Internal + 2 External ESG Initiatives
Silver	Achieving 3 criteria	
Bronze	Achieving 2 criteria	
Best Corporate Financial Education and ESG Leadership of the Year		
For the commercial firm that has achieved the most criteria.		

Assessment Criteria

The Criteria set out to demonstrate how financial education could be met. Submissions of the firms should specify and elaborate on the criteria engaged.

- Digital Campaigns/ App:** Websites, apps, videos, social media platforms, online tutorials or hotlines that are available to consumers with free and impartial sources of information, tools, and resources. Consumers are able to navigate the financial landscape and access the information they need
- Print:** Publication of books, toolkits, and training materials for free financial education to the public
- Events:** Providing public financial education through engaging and exciting events, road shows, focus groups, games, etc.
- Support of Vulnerable Groups:** Special programs or resources for specific cohort groups, e.g. people experiencing high financial stress, people with low income or few assets, vulnerable seniors, and religious differences as they pertain to loans and borrowings
- Innovative Examples / Creativity:** Actively adopting technologies in business models for a better financial education future, including the internet of things, artificial intelligence, and the sharing economy
- Co-effort Examples:** Partnership or sponsorship to support a financial education program run by a charity, school, non-profit organization, or policymaker
- Volunteering Programs:** Building a sustainable volunteer program in which promoting financial education is one of the goals or activities
- Staff Engagement Programs:** Providing workplace financial wellness programs for employees. Encouraging lifelong learning and attaining professional qualifications in financial planning and sustainability investment e.g. CFP certification, AFP certification, QRA credential, etc.
- Research Examples:** Commissioning research to highlight the need for financial education so that the best practices can be shared and publicized
- Digital Finance related:** Any financial education initiative that focuses on digital finance, including but not limited to crypto-assets and Central Bank Digital Currencies (CBDCs)

ESG Engagement

To be qualified as an awardee of the “Corporate Financial Education and ESG Leadership”, firms must showcase their commitment in the sustainable development of their organizations, as well as the community in every aspect. Therefore, applicants must also submit TWO INTERNAL + TWO EXTERNAL ESG INITIATIVES they have done over the year. They must provide proof of evidence of the initiatives, e.g. annual report, sustainability report, website, press release etc.

What are the ESG Categories ?

ESG stands for Environmental, Social and Governance. It refers to the three key factors that investors and stakeholders consider when evaluating the sustainability and ethical impact of a company or organization.

Environmental includes a company's impact on the environment and its efforts to manage and mitigate environmental risks and opportunities. This includes but not limited to:

- Reducing Carbon Emissions
- Sustainable Sourcing
- Protecting Biodiversity
- Minimizing Waste Production
- Donation Program to Environmental Cause
- Developing Sustainable Energy Solutions
- Green Office

Social refers to a company's impact on people and communities. This includes but not limited to:

- Supporting Community Development
- Promoting Diversity and Inclusion
- Supporting Staff Volunteering
- Advocating and implementing sustainable investment
- Promoting Employee Relations
- Valuing Human Rights
- Ensuring Product Safety and Quality

Governance factors relate to a company's management and decision-making structures. This includes but not limited to:

- Ensuring Transparency in Business Practices
- Implementation of a Broad Diversity Policy
- Promoting Ethical Leadership
- Promoting Executive Compensation
- Ensuring Shareholder Rights
- Implementing Anti-corruption Policies

What is Internal and External ESG?

Internal ESG refers to ESG programs that take place within the organization, targeting internal stakeholders.

External ESG refers to ESG programs that are dedicated to the public, targeting external stakeholders. Below are some examples but not limited to:

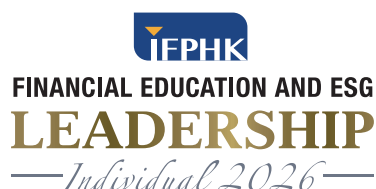
Internal ESG

- Training and Workshops
- Competitions
- Incentives
- Certification Scheme
- Green Office
- Leadership Programs
- Staff Engagement Programs

External ESG

- Green Buildings
- Biofuels and Carbon Offsetting
- Sustainable Packaging
- Volunteering
- Education Program
- Community Engagement
- Innovation & Talent Development

Individual Financial Education and ESG Leadership ^{*New*}



"Individual Financial Education and ESG Leadership" recognize visionary leaders who drive meaningful impact through financial education and ESG engagement.

This award honors the top leadership (e.g. CEO, Managing Director, or equivalent) of the corporate awardees of the "Corporate Financial Education and ESG Leadership". It celebrates those who have demonstrated outstanding leadership in advancing financial education and ESG initiatives and have successfully mobilized their organizations to deliver significant, measurable contributions to the community and financial services sector.

Eligibility

- Candidates must be the current senior executive (C-suite or equivalent) of the awardee organization and directly responsible for leading the firm's financial education and ESG strategies.
- Candidates must be nominated by the awardee organization.
- Recognizes sustained and impactful ESG contributions achieved through leadership, influence, and organizational mobilization.

Submission Requirements

- A completed nomination form from the awardee organization.
- A personal statement (max. 1,000 words) outlining the ESG leadership journey and achievements.
- Supporting documentation (program reports, impact metrics, testimonials, or media coverage).

Program Fee

HK\$28,000

Entitlements

- Trophy presentation at the Awards Presentation Ceremony.
- 2 seats at the Ceremony.
- Name mentioning in event releases and IFPHK social media channels.
- An opportunity to deliver a 3-minute acceptance speech at the Ceremony to share leadership insights.

Program Fee

The program fee includes:

Awards Presentation Ceremony: All awarded commercial firms, non-profit entities and individuals will be invited to attend the Ceremony. To mark this memorable occasion, government officials and industry leaders will be invited to witness the naming of the awardees.

Seats at Awards Presentation Ceremony (including award representative): 5 seats or 10 seats for commercial firm, 2 seats for individual.

Trophy: As a token of appreciation, corporate and individual awardees will be presented with a trophy at the Awards Presentation Ceremony to showcase their commitment in promoting financial wellbeing and corporate social responsibility.

Promotion Opportunity: Awarded individuals will be invited to deliver a 3-minute acceptance speech at the Ceremony to share leadership insights.

Logo Use: Awarded commercial firms are eligible to use the award logo for promotional purposes (1 January 2027 – 31 December 2027). The “Use of Mark Guidelines” will be provided.

List of Benefits	Individuals HK\$28,000	Commercial Firms HK\$60,000	Commercial Firms HK\$48,000	Non-profit Entities HK\$5,000
Complimentary Seats				
• Tables/ Seats at Awards Presentation Ceremony (including award representative)	2 Seats	1 Table (10 Seats)	Half Table (5 Seats)	1 Seat
Acknowledgement				
• Trophy presentation at Awards Presentation	☆	☆	☆	☆
• 3-minute Acceptance Speech at Awards Presentation	☆	—	—	—
Advertisement				
• Advertisement in IFPHK Newsletter	—	1 x Full Page 4C	1 x Full Page 4C	—
Promotion Exposure				
• Name mentioning in event release	☆	☆	☆	☆
• Name and Logo in campaign webpage	☆ (Individual Name only)	☆	☆	☆
• Post event feed in IFPHK social media channels	☆ (Individual Name only)	☆	☆	☆
Use of Logo Rights				
• Eligible to use the awarded logo for one year	—	☆	☆	☆

Remarks: The content of this package and all insertion dates are subjected to the Organizers' final approval.

2025 EVENT HIGHLIGHTS



In its eighth year, the FELA 2025 was once again a resounding success with 10 companies honored at the awards presentation ceremony. Almost 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 IFPHK is also privileged to have 12 esteemed organizations support the Awards.

Best Corporate Financial Education and ESG Leadership of the Year

- | | |
|---|---|
| <ul style="list-style-type: none">• Bank of Communications (Hong Kong) Limited• China Life Insurance (Overseas) Company Limited• Chow Tai Fook Life Insurance Company Limited | <ul style="list-style-type: none">• FWD Life Insurance Company (Bermuda) Limited• Prudential Hong Kong Limited |
|---|---|

Corporate Financial Education and ESG Leadership (Gold Award)

- | | |
|--|---|
| <ul style="list-style-type: none">• Bank of Communications (Hong Kong) Limited• China Life Insurance (Overseas) Company Limited• Chow Tai Fook Life Insurance Company Limited• FWD Life Insurance Company (Bermuda) Limited• Hong Kong Family Welfare Society Financial Education Centre | <ul style="list-style-type: none">• Prudential Hong Kong Limited• Resource Centre for Interdisciplinary Studies and Experiential Learning (RCISEL) The Education University of Hong Kong• Sun Life Hong Kong Limited• The Hang Seng University of Hong Kong• Tung Wah Group of Hospitals Healthy Budgeting Family Debt Counselling Centre |
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Enquiries

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Tel: 2982 7888 Fax: 2982 7777 Email: marketing@ifphk.org Website: www.ifphk.org

SUPPORTING ORGANIZATIONS



* In alphabetical order after regulators and government agencies.

IFPHK ESG Statement

Our Environmental, Social and Governance (ESG) policy is anchored in ESG promotion to our stakeholders. We are dedicated to advocate ESG education, deliver its benefits to, and raise awareness among our members and relevant professionals in the business community.

Based on the latest trend of ESG knowledge and development, we aim to leverage academic research and industry expertise to advance our ESG practices to raise professional standards of financial planners in Hong Kong and Asia. IFPHK will implement our ESG policy through:

- Integrating ESG concepts into the six-step financial planning process
- Disseminating our latest ESG integration in financial planning to stakeholders and the community through our regular and designated channels such as seminars, conferences and award recognition

Remarks: In case of any dispute, the decision of the organizer will be final and binding on all parties concerned.

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