

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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