

*For immediate release*

**Press Release**

**Institute of Financial Planners of Hong Kong and The Education University of Hong Kong  
Sign Memorandum of Understanding  
to Nurture Financial Talents for Hong Kong and Macau**

(Hong Kong/ Macau – 2 July 2025) The Institute of Financial Planners of Hong Kong (IFPHK) and The Education University of Hong Kong (EDUHK) have officially signed a Memorandum of Understanding (MOU) today, marking the beginning of a collaborative effort to enhance the financial planning profession. This partnership aims to elevate professional standards through the integration of academic and institutional resources, broaden pathways for CFP certification, promote a diversified qualification framework, deepen collaboration among research, academic and industry sectors and establish a long-term strategic alliance. This initiative addresses the evolving needs of the financial industry and seeks new momentum to drive its growth.

The signing ceremony took place on the EDUHK campus, officiated by Professor John Lee, President of EDUHK and Dr. Paris Yeung, CEO of IFPHK. The event was witnessed by Professor Li Wai Keung, Dean of EDUHK and Mr. Edwin Cheung, Chairman of IFPHK. The ceremony also saw attendance of Professor Li Wai Keung, Dean of EDUHK; Dr. Chan Man Ho, Associate Dean of EDUHK; Dr. Fox Hu, Head of Department of EDUHK and Dr. Keith Yu, Vice Chairman (Development) of IFPHK.

In his remarks, Mr. Edwin Cheung, Chairman of IFPHK stated, “This collaboration with EDUHK has hold special significance as we celebrate IFPHK 25<sup>th</sup> anniversary this year. It exemplifies a seamless exchange between academia and practice. Graduates of the ‘Master of Arts in Personal Finance Education’ will directly meet the education requirement for CFP certification, paving an ideal career path for our emerging talents. Additionally, this collaboration expands the spectrum of the education’s framework. The upcoming ‘Bachelor of Arts (Honour) in Personal Finance’ will further complements the talent pipeline for the financial planning industry. We are especially grateful to Dr. Tan Weiqiang, for his exceptional leadership in bringing this partnership to fruition. “

He continued, “The CFP certification is recognized as the world’s most authoritative financial planning qualification, known for its stringent ‘4E’ requirement: education, examination, experiences and ethics. As the sole licensing body in Hong Kong and Macau authorized by the Financial Planning Standards Board Limited, IFPHK has nurtured nearly 3,600 certificants. Globally, CFP professionals are present across 28 economies, exceeding 230,000 professionals. This underscores the international recognition of the certification.”

香港教育大學校長李子建教授於致辭時說：「內容待定。」

Professor John Lee, President of EDUHK commented,



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

About IFPHK's "CFP Certification": <https://shorturl.at/TTRN6>

About EDUHK's "Bachelor of Arts (Honours) in Personal Finance": <https://shorturl.at/pB4ej>

About EDUHK's "Master of Arts in Personal Finance Education": <https://shorturl.at/OhKF8>

### **About IFPHK**

IFPHK was established in June 2000 as a non-profit organization for the fast-growing financial services industry. It aims to be recognized in the region as the premier professional body representing financial planners dedicated to upholding the highest professional standards.

The Institute is the sole licensing body in Hong Kong and Macau authorized by the 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 countries/regions; the majority of these professionals are in the U.S., Canada, China, Australia and Japan, with approximately 3,600 CFP certificants in Hong Kong.

IFPHK has 6,700 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 trading, accounting, and legal services.

### **About CFP Certification**

CFP certification is the global symbol of excellence in financial planning and represents financial planners who commit to standards of competency and ethics, and to putting clients' interests first. The CERTIFIED FINANCIAL PLANNER credential represents financial planning professionals who commit to better serving their clients through rigorous international standards, ethical practices and lifelong learning.

### **Media Enquiries**

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	<p><b>Photo 1:</b></p> <p>The IFPHK and The Education University of Hong Kong (EDUHK) officially signed a Memorandum of Understanding (MOU) today (2 July 2025).</p> <p>The signing ceremony by officiated by Professor John Lee, President of EDUHK and Dr. Paris Yeung, CEO of IFPHK. Witnessing the event were Professor Li Wai Keung, Dean of EDUHK and Mr. Edwin Cheung, Chairman of IFPHK.</p>
	<p><b>Photo 2:</b></p> <p>Professor John Lee, President of EDUHK and Dr. Paris Yeung, CEO of IFPHK shook hands to express their gratitude following the signing of the MOU.</p> <p>The ceremony was also attended by Professor Li Wai Keung, Dean of EDUHK, Dr. Chan Man Ho, Associate Dean of EDUHK, Dr. Fox Hu, Head of Department of EDUHK, Mr. Edwin Cheung, Chairman of IFPHK and Dr. Keith Yu, Vice Chairman (Development) of IFPHK.</p>
	<p><b>Photo 3:</b></p> <p>Professor John Lee, President of EDUHK delivered a welcome remark at the signing ceremony.</p>
	<p><b>Photo 4:</b></p> <p>Mr. Edwin Cheung, Chairman of IFPHK delivered a welcome remark at the signing ceremony.</p>