

For immediate release

Press Release

**The Institute of Financial Planners of Hong Kong
Fully Committed to Advancing CFP Certification in Hong Kong and Macau**

(Hong Kong/ Macau – 18 Aug 2025) To further strengthen the long-term development of the CFP Certification in Macau, the CEO of the Institute of Financial Planners of Hong Kong (IFPHK) Dr. Paris Yeung, along with a delegation including Ms. Daphne So, Head of Policy and Standards, Ms. Ann Tsui, Head of Education Development, and Ms. Victoria Leong, Assistant to the CEO, visited the Association of Macau Financial Employees, Banco Delta Asia Bank, and the City University of Macau on 15 August 2025.

The main purpose of this trip was to provide banks and financial practitioners with a detailed introduction to the importance, recognition, and advantages of the CFP Certification and AFP Certification, encouraging industry professionals to enroll in the courses and take the certification exams. The attending Charter President of the Association of Macau Financial Employees, the current President, and the Chairman all expressed strong agreement on the importance and necessity of developing financial talent in Macau. Both parties will enhance future exchanges and collaboration, including hosting lectures and forums, jointly organizing professional courses, and increasing mutual visits and exchange activities. Meanwhile, the City University of Macau will actively plan a talent development seminar with IFPHK by the end of the year, as well as exchange activities in the coming months. IFPHK also took the opportunity of this visit to invite Banco Delta Asia Bank to become an institutional member of IFPHK, aiming to strengthen professional training in financial planning.

Since April of this year, the Institute has launched several key initiatives and activities in Macau, including:

- On April 11, the successful hosting of the "2025 Hong Kong-Macau Education and Professional Institutions Exchange," with strong support from the Macau Institute of Management, the Macau Insurers' Association, the School of Liberal Arts at Macau University of Science and Technology, and the School of Management and Professional Development at Macau University of Tourism. Prior to the event, the delegation paid special visits to the Monetary Authority of Macau and the Macau Institute of Financial Services.
- On May 12, Dr. Paris Yeung led a delegation, including Ms. Daphne So, Head of Policy and Standards, and Ms. Ann Tsui, Head of Education Development, to visit the Macau Education and Youth Development Bureau, the Macau Talent Development Committee, and the Macau University of Science and Technology. Multiple agreements were reached on professional talent development, laying a solid foundation for the growth of financial planning expertise in Macau.

- On May 29, the Institute and the School of Liberal Arts at Macau University of Science and Technology held a grand signing ceremony for a memorandum of cooperation on the university campus.

This strategic partnership aims to deepen collaboration in building financial planning education systems, cultivating professional talent, and advancing cutting-edge academic research, jointly addressing the growing demand for specialized financial services driven by the rapid development of the Guangdong-Hong Kong-Macau Greater Bay Area.

Looking ahead, the Institute will further promote the collaborative development of financial planning professionalism in Hong Kong and Macau, providing professional talent support for the Greater Bay Area's goal of becoming a world-class financial hub.

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.

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Photo 1:

IFPHK delegation met with representatives from the City University of Macao, International Training and Testing Centre.

From Left: City University of Macao, International Training and Testing Centre Administrative Assistant Ms. Sunny Ng, Project Management Officer Ms. Zoe Yuen, IFPHK CEO Dr. Paris Yeung, City University of Macao, International Training and Testing Centre Acting Head Ms. Doris Wu, IFPHK Head of Policy and Standards Ms. Daphne So, Head of Education Development Ms. Ann Tsui and Assistant to the CEO Ms. Victoria Leong.



Photo 2 & 3:

IFPHK delegation exchanged insights with representatives of the Association of Macau Financial Employees on talent development strategies in Hong Kong and Macau.

From Left: Association of Macau Financial Employees Vice Chairman Ms. Phoebe Tan, Chairman Mr. Jason Chan, Charter President Mr. Pierre Ng, President Mr. Ray Pang, IFPHK CEO Dr. Paris Yeung, Head of Policy and Standards Ms. Daphne So, Head of Education Development Ms. Ann Tsui and Assistant to the CEO Ms. Victoria Leong.



Photo 4:

IFPHK delegation pictured with Banco Delta Asia representatives and exchanged views on the financial planning landscape in Hong Kong and Macau.

From Left: Banco Delta Asia Chairman Assistant Ms. May Lok, IFPHK Head of Policy and Standards Ms. Daphne So, CEO Dr. Paris Yeung, Head of Education Development Ms. Ann Tsui, Assistant to the CEO Ms. Victoria Leong and Banco Delta Asia Corporate Banking Business Development Senior Vice President Mr. Ricky Leung.

