

*For Immediate Release*

**Press Release**

**IFPHK Financial Planning Conference 2025 Concluded Successfully**

*A Major Event Marking the Silver Jubilee of IFPHK*

*Gathering Political and Economic Leaders to Analyze the New Economic Landscape  
and Drive the Financial Planning Profession New Milestone*

(Hong Kong/ Macau – 10 September 2025) Organized by the Institute of Financial Planners of Hong Kong (IFPHK) as one of its key signature events, the Financial Planning Conference 2025 was successfully held on 9 September 2025 (Tuesday) at the Hong Kong Convention and Exhibition Centre. This year's silver jubilee conference attracted over 20 prominent figures from the global and local sectors, including government leaders, retirement planning experts, fintech innovators, digital finance experts and financial leaders to share their wisdom with over 300 participants. The speakers discussed the latest market trends and future strategies, provoking thoughts to enhance Hong Kong's position as an international finance center.

Under the theme “Connecting the World for 25 Years, Powering a Sustainable Financial Planning Future”, the Conference featured a celebration ceremony with the Guest of Honor, Mr. Joseph Chan, JP, Under Secretary for Financial Services and the Treasury of The Government of Hong Kong SAR. He was joined by Mr. Paul Grimes, Chief Professionalism Officer of Financial Planning Standards Board Ltd., Ms. Cynthia Hui, Chief Operating Officer and Executive Director of Mandatory Provident Fund Schemes Authority, Mr. Edwin Cheung, Chairman of IFPHK, Dr. Paris Yeung, CEO of IFPHK, Dr. Keith Yu, Vice Chairman of IFPHK and Dr. David Pun, Vice Chairman of IFPHK, who participated in a meaningful lighting ceremony to celebrate and witness the IFPHK's milestone.

In his opening address, Mr. Edwin Cheung, Chairman of the IFPHK said, “In the last quarter of a century, IFPHK has grown into the leading professional body for financial planners in Hong Kong. The key to our success is our commitment to abide by the 4E requirement that is the gold standard of CFP certification, which are: Education, Examination, Experience, and Ethics. The last E, Ethics, is the cornerstone of professionalism. We are glad that Mr. Paul Grimes, Chief Professionalism Officer of the Financial Planning Standards Board, is here in Hong Kong. He will speak to us on the future of financial planning profession. “

He continues, “Our programme today is packed with insights from the best minds in our industry. May I take this opportunity to thank our Guest of Honour and expert speakers for taking the time from their busy schedules to be with us. We look forward to the exciting topics that will be discussed.”

The conference gathered industry leaders and innovators, including Mr. Paul Grimes, who discussed the future challenges of financial planning from an international perspective and as a CFP professional. The first forum, titled "Nurturing Wealth Management Talents for Hong Kong as a Financial Hub," was moderated by Mr. Edwin Cheung and featured speakers including Mr. Nicholas Kwan, Deputy Head of the Chief Executive's Policy Unit of The Government of the HKSAR; Mr. Sam Yu, Chairman of the Hong Kong Investment Funds Association; and Dr. Kimmis Pun, Managing Director of Family Office, FA Corp (Tax Accountant) and Managing Director, Head of Family Office of Asian Green Fund Management (Fund Manager). The speakers analyzed the definition of future financial talent and strategies to strengthen and expand the local talent pool.

One of the afternoon highlights, "How AI Enhance Customer Experience in Wealth Management and Financial Planning," featured insights from fintech leaders such as Mr. Tat Lee, Chief Executive of WeLab Bank; Mr. Gabriel Kung, Chief Commercial Officer of Bowtie Life Insurance Company Limited; and Ms. Steffanie Yuen, Managing Director and Head of Hong Kong at Endowus. They discussed how technology can create new experiences for clients, moderated by former IFPHK Chairman Mr. Chris Tse.

A well-received session, "Succession for Inheritance and Retirement Planning," brought together three retired planning experts: Ms. Ka Shi Lau, BBS, Chairman of Hong Kong Trustees' Association, Mr. Gollum Shau, Managing Director, Hong Kong of Grandtag Financial Consultancy & Insurance Brokers Ltd; and Mr. Leo Lai, Managing Director of Raffles Family Office, who shared essential tools and practical case studies on retirement and wealth transfer, moderated by IFPHK Past President Mr. Tony Mak.

The conference concluded with the session "New Wave of Financial Innovations – Digital Asset Exchange, Stablecoins and Real-World Asset," aiming to inspire financial professionals with fresh perspectives. The forum was moderated by former IFPHK Chairman Mr. Paul Pong, featuring Dr. King Au, Executive Director and Board Member of Financial Services Development Council; Ms. Sherry Zhu, Global Head of Digital Assets of Futu Holdings Limited; and Mr. Chris Lee, Vice President of China Asset Management (Hong Kong) Limited.

To commemorate this silver jubilee, IFPHK unveiled the theme "Connecting the World for 25 Years, Powering a Sustainable Financial Planning Future." The Institute also showcased an inspiring video presentation highlighting its remarkable journey and contributions since inception. Additional initiatives included the launch of a dedicated anniversary website, a commemorative booklet, a special souvenir and a three-year reinstatement offer, all designed to celebrate this significant milestone with members and the public.

Looking ahead, IFPHK remains committed to empowering the professionalism of financial planners. The Institute is also poised to strengthen ties with the financial sectors in Hong Kong and Macao, actively expand its membership base, and enhance its brand influence — all in pursuit of unlimited and remarkable 25 years of excellence in the coming future.

Visit the IFPHK's 25<sup>th</sup> Anniversary website:

[https://www.ifphk.org/webs/minisites/25\\_Anniversary/index.html](https://www.ifphk.org/webs/minisites/25_Anniversary/index.html)

**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 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 Captions**

	<p><b>Photo 1:</b> Opening Keynote Speech by Mr. Joseph Chan, JP, Under Secretary for Financial Services and the Treasury of The Government of Hong Kong SAR.</p>
	<p><b>Photo 2:</b> Opening Remarks by Mr. Edwin Cheung, Chairman of IFPHK.</p>



**Photo 3:**  
Keynote Speeches by Ms. Cynthia Hui, Chief Operating Officer and Executive Director of Mandatory Provident Fund Schemes Authority



**Photo 4:**  
Keynote Speeches by Mr. Paul Grimes, Chief Professionalism Officer of Financial Planning Standards Board Ltd.



**Photo 5:**  
IFPHK 25<sup>th</sup> Anniversary Celebration Ceremony.

(From left to right)  
 Dr. Keith Yu, Vice Chairman of IFPHK;  
 Mr. Edwin Cheung, Chairman of IFPHK;  
 Ms. Cynthia Hui, Chief Operating Officer and Executive Director of Mandatory Provident Fund Schemes Authority;  
 Mr. Joseph Chan, JP, Under Secretary for Financial Services and the Treasury of The Government of Hong Kong SAR;  
 Mr. Paul Grimes, Chief Professionalism Officer of Financial Planning Standards Board Ltd.;  
 Dr. Paris Yeung, CEO of IFPHK; and  
 Dr. David Pun, Vice Chairman of IFPHK.



**Photo 6:**  
Individual presentation session by Ms. Karina Wong, Co-Leader and Family Enterprise Leaders of EY Greater China Private Tax.



**Photo 7:**  
Individual presentation session by Mr. Jason Kwong, Group Chief Operating Officer of Private Client Services by Mercer Limited.



**Photo 8:**  
Panel discussion I: Nurturing Wealth Management Talents for Hong Kong as a Financial Hub

(From left to right)

Mr. Edwin Cheung, Chairman of IFPHK;

Dr. Kimmis Pun, Managing Director of Family Office, FA Corp (Tax Accountant) and Managing Director, Head of Family Office of Asian Green Fund Management (Fund Manager);

Mr. Nicholas Kwan, Deputy Head of Chief Executive's Policy Unit, The Government of the HKSAR and

Mr. Sam Yu, Chairman, Hong Kong Investment Funds Association and Managing Director, Head of Compliance - Asia Pacific (Ex-Japan) of Barings Asset Management (Asia) Limited



**Photo 9:**  
Panel Discussion II: How AI Enhance Customer Experience in Wealth Management and Financial Planning

(From left to right)

Mr. Chris Tse, Former Chairman of IFPHK;

Ms. Steffanie Yuen, Managing Director and Head of Hong Kong of Endowus;

Mr. Gabriel Kung, Chief Commercial Officer of Bowtie Life Insurance Company Limited and

Mr. Tat Lee, Chief Executive of WeLab Bank; and



**Photo 10:**

Panel Discussion III: Succession for Inheritance and Retirement Planning

(From left to right)

Mr. Tony Mak, Past President of IFPHK;

Mr. Leo Lai, Managing Director of Raffles Family Office;

Ms. Ka Shi Lau, BBS, MAoF, FHKSI (Hon), FCG, HKFCG, Certified Trust Practitioner (CTP), Chairman of Hong Kong Trustees' Association and Independent Non-executive Director of Citibank (HK) Limited; and

Mr. Gollum Shau, Managing Director, Hong Kong of Grandtag Financial Consultancy & Insurance Brokers Ltd.



**Photo 11:**

Panel Discussion IV: New Wave of Financial Innovations – Digital Asset Exchange, Stablecoins and Real-World Asset

(From left to right)

Mr. Paul Pong, Former Chairman of IFPHK;

Dr. King Au, Executive Director and Board Member of Financial Services Development Council;

Ms. Sherry Zhu, Global Head of Digital Assets of Futu Holdings Limited; and

Mr. Chris Lee, Vice President of China Asset Management (Hong Kong) Limited



**Photo 12:**

Over 250 guests attended the IFPHK Financial Planning Conference 2025, creating a lively atmosphere.