

FOR IMMEDIATE RELEASE

IFPHK x IFTA's "AI and FinTech Solutions for Financial Planning Day" Concluded Successfully FinTech Leaders Share Insight for a Brighter Financial Planning Future

(Hong Kong and Macau – 5 December 2025) Jointly organized by the Institute of Financial Planners of Hong Kong (IFPHK) and the Institute of Financial Technologists of Asia (IFTA), the inaugural "AI and FinTech Solutions for Financial Planning Day," concluded successfully on 3 December 2025, at the HKU iCube.

The event attracted nearly a hundred attendees, including industry leaders, innovators, and professionals from the realms of artificial intelligence and financial technology. Participants engaged in lively discussions on the transformative impact of technology on the financial sector.

The program began with a forum entitled "Mastering Artificial Intelligence: Addressing the Dual Challenges of Ethics and Cybersecurity," which tackled critical issues such as the potential for technology to replace human roles and concerns over data privacy. Forum speakers included Mr. Chris Leung, Partner, Financial Services Consulting of EY and Mr. Lance Yeung, Assistant Director of AI and Data of Hong Kong Science Park, with Mr. Paul Pong, Founder and Chairman of IFTA, serving as moderator. Additionally, fintech platform startup Palm Asset and award-winning enterprise KoiZai demonstrated their financial planning service solutions.

Prior to the official opening, IFPHK expressed deep condolences for the victims of the Tai Po Wang Fuk Court fire and extended its sincerest sympathies to the injured and affected individuals.

Following this, Mr. Edwin Cheung, Chairman of IFPHK, said, "Artificial intelligence and financial technology are bringing transformative changes to the financial industry, not only providing the public with more resilient, transparent, and efficient financial services but also challenging existing regulatory frameworks and market logic." He continued, "To address the changes in our era and industry, IFPHK will incorporate the 'Artificial Intelligence and FinTech Policies' into its mission and visions in 2026, as required by the Financial Planning Standards Board. We will launch a series of courses and events, including the '2026 Hong Kong Economic Transformation and SME Business Summit Forum' co-hosted with the Kowloon Chamber of Commerce on 6 January next year, as well as the Institute's flagship event, the 'Financial Planning Conference,' to respond to the industry's demand for information on AI and financial technology.

In his welcome address, Mr. Paul Pong, Founder and Chairman of IFTA said, "I would like to extend my sincere gratitude to IFPHK for their dedication, as well as to the sponsors and supporting organizations for their generous contributions. The event today attracted a full audience, clearly demonstrating the industry's strong interest and anticipation for technology-driven transformation." Mr. Pong continued, "As we embrace enhanced efficiency and service innovation, we also face a series of profound challenges. For instance, how can the 'black box' of algorithms ensure fairness and transparency? How can the application of vast amounts of data balance with the protection of personal privacy? How can we prevent increasingly sophisticated deepfake technologies? The rapid development of financial technology poses unprecedented questions for ethical standards, cybersecurity, and

regulatory frameworks. We must not only ask what technology can achieve, but also reflect on how we can responsibly harness it."

IFPHK is committed to providing its members and the public with a series of innovative experiences in 2026, including large-scale events, financial education initiatives, and professional training, all aimed at shaping the future of technology in finance.


For more information about upcoming events, please visit www.ifphk.org and follow IFPHK on social media:

Facebook: https://www.facebook.com/official.ifphk/?locale=zh_HK

Instagram: https://www.instagram.com/ifphk_official/

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Press Release Photos

1		<p>Mr. Edwin Cheung, Chairman of IFPHK, delivered the opening remarks at the “AI and FinTech Solutions for Financial Planning Day”.</p>
2		<p>At the “AI and FinTech Solutions for Financial Planning Day”, the opening remarks were delivered by Mr. Paul Pang, the Founder and Chairman of the Institute of Financial Technologists of Asia (IFTA).</p>
3		<p>A group photo of the organizers, speakers, and representatives from supporting and sponsoring organizations of the “AI and FinTech Solutions for Financial Planning Day”.</p>

4		<p>Forum Speakers of "Mastering Artificial Intelligence: Addressing the Dual Challenges of Ethics and Cybersecurity"</p> <p>From left : Mr. Paul Pang, the Founder and Chairman of IFTA (host), Mr. Chris Leung, Partner, Financial Services Consulting of EY and Mr. Lance Yeung, Assistant Director of AI and Data of Hong Kong Science Park.</p>
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About IFPHK


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

The Institute is the sole licensing body in Hong Kong authorized by 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 regions; the majority of these professionals are in the U.S., China, Japan, Canada and Brazil, with approximately 3,410 CFP certificants in Hong Kong.

As at 31 May 2025, IFPHK has 5,698 members in Hong Kong including 1,036 Qualified Retirement Adviser (QRA) holders; and represents financial planning practitioners in diverse professional backgrounds such as banking, insurance, independent financial advisory, stock broking, accounting, and legal services.

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