

FOR IMMEDIATE RELEASE

IFPHK Expands Regional Partnerships to Singapore and Macau *Further Enhancing Leadership in Professional Training*

(Hong Kong/Macau, February 10, 2026) The Institute of Financial Planners of Hong Kong (IFPHK) has recently signed Memoranda of Understanding with multiple cross-regional professional institutions to establish strategic partnerships. These collaborations further reinforce IFPHK's leadership in professional training and certification, underscoring its commitment to providing financial practitioners with comprehensive and forward-looking professional development platforms.

In Macau, IFPHK continues its close collaboration with the Macau Institute of Financial Services (IFS) by organizing four CFP certification examinations annually. This initiative aims to further enhance the professional standing of CFP professionals in the region. Through a robust professional training framework and well-structured examination arrangements, IFPHK seeks to nurture more financial planning professionals in Macau and support them in seizing opportunities arising from the development of Guangdong-Hong Kong-Macao Greater Bay Area.

In Southeast Asia, IFPHK has joined forces with Singapore's SingCapital Pte Ltd to co-host the "Mortgage Wealth Planner Certificate Course" in Hong Kong. Scheduled for launch in the first quarter of 2026, the course will adopt a hybrid delivery format combining face-to-face and online learning. It targets financial planners and financial services practitioners in Hong Kong and Macau, and those aspiring to develop competence and skillset in the mortgage wealth planning sector.

This advanced certification programme focuses on the key areas including mortgage planning, property financing, and wealth structuring in both Singapore and Hong Kong. Senior professional instructors from both regions will be invited to share their expertise, practical insights and real-life case studies, offering a well-rounded and applied learning experience.

Looking ahead, fostering strategic collaborations across businesses, industries, and regions remains a key initiative of IFPHK. Through innovative and diversified training models, IFPHK aims to better address practitioners' evolving needs in dynamic financial markets, enhance their professional competitiveness, and further elevate standards of excellence in financial planning.

Photo Caption



On 9 February 2026, the Institute of Financial Planners of Hong Kong and SingCapital Pte Ltd signed a Memoranda of Understanding at the IFPHK office.

From left to right: IFPHK Chief Executive Officer Dr. Paris Yeung and SingCapital Pte Ltd Chief Executive Officer Mr. Alfred Chia.

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. As at 31 December 2025, Hong Kong had approximately 3,465 CFP certificants.

At present, IFPHK has 5,863 members in Hong Kong including 1,088 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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