

FOR IMMEDIATE RELEASE

Institute of Financial Planners of Hong Kong and WPSB Sign MOU Launch "Qualified Family Office Advisor Certificate Course"

*Inaugural Class Successfully Held Expanding Professional Training Landscape
to Nurture Cross-Border Wealth Management Talent*

(Hong Kong/Macau, March 18, 2026) The Institute of Financial Planners of Hong Kong (IFPHK) signed a Memorandum of Understanding with the Worldwide Professional Standards Board (WPSB), announcing the launch of the "Qualified Family Office Advisor (QFOA) Certificate Course" in Hong Kong. This collaboration marks a significant milestone in the IFPHK's professional development, extending its training scope into the family office and cross-border wealth planning sectors, thereby broadening its professional training landscape. The Institute is also pleased to announce that the inaugural QFOA course was successfully held at the Institute's premises, providing high-calibre, practical training for industry professionals.

The signing ceremony was held on 17 March 2026 (Tuesday) at the IFPHK's office with Dr. Paris Yeung, Chief Executive Officer of IFPHK, and Dr. Kimmis Pun, Chairman of WPSB, were in attendance to sign the agreement. This represents a closer collaboration between the two professional bodies in advancing standards in wealth planning and family office advisory.

Dr. Paris Yeung, Chief Executive Officer of IFPHK said, "Both locally and globally, family offices are now a major growth driver of the asset and wealth management industry. The Hong Kong Government has also been active in developing new initiatives and support to attract family offices to set up in Hong Kong. According to Deloitte's research published in February 2026, Hong Kong is home to 3,384 single-family offices employing more than 10,000 professionals and contributes to approximately HK\$12.6 billion annual operating expenditure to the local economy," he said.

"With its robust legal system, simple tax regime and free flow of capital, Hong Kong remains one of the preferred locations for Mainland and overseas financial institutions. Through this collaboration with WPSB, we aim to equip our members with core competencies in family office operations, governance and cross-border wealth planning, enhancing their professional competitiveness and supporting talent development for the industry. The inaugural course received an enthusiastic response, and participants highly praised the depth and practicality of the curriculum. We are very encouraged by this."

Dr. Kimmis Pun, Chairman of Wealth Planning Standards Board (WPSB) said, "Singapore and Hong Kong are both leading wealth management and family office hubs in Asia, each with distinct strengths in professional development and regulatory frameworks.

"This collaboration not only facilitates the exchange of professional standards, but also introduces to Hong Kong a structured and practice-oriented training framework. By bringing WPSB's experience in wealth planning standards and family office education to Hong Kong, we look forward to fostering greater talent exchange between the two markets and further elevating professional standards."

The Qualified Family Office Advisor (QFOA) Certificate Programme covers key areas such as family legacy planning, family office structures, governance, jurisdictional comparisons, asset allocation and risk management, as well as succession and family values. Combining theory with practical case studies, the programme equips practitioners to navigate increasingly complex cross-border wealth planning needs. Participants who complete the programme requirements will receive the QFOA certification.

IFPHK reaffirmed its commitment to strengthening its role as a leading professional body and industry platform, promoting high standards of practice and supporting the long-term development of Hong Kong's financial planning profession.

Photo Caption

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| | <p>Photos 1 and 2: Dr. Paris Yeung, Chief Executive Officer of the Institute of Financial Planners of Hong Kong, and Dr. Kimmis Pun, Chairman of the Wealth Planning Standards Board, sign the Memorandum of Understanding, marking their collaboration to jointly promote the Qualified Family Office Advisor (QFOA) Certificate Programme in Hong Kong.</p> |
| | <p>Photo 3: Dr. Paris Yeung, Chief Executive Officer of the Institute of Financial Planners of Hong Kong, and Dr. Kimmis Pun, Chairman of the Wealth Planning Standards Board, pictured with representatives at the ceremony.</p> |

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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