香港財務策劃師學會
INSTITUTE OF FINANCIAL PLANNERS OF HONG KONG

FOR IMMEDIATE RELEASE

IFPHK Financial Planning Conference 2026 Successfully Concludes

Industry Leaders Explore Cross-Border Planning, Sustainable Retirement and Hong Kong's Wealth Growth Momentum

(Hong Kong/ Macau, 4 September 2026) The Institute of Financial Planners of Hong Kong ("IFPHK") successfully held the IFPHK Financial Planning Conference 2026 yesterday at the Hong Kong Convention and Exhibition Centre, under the theme "Repositioning Wealth: Cross-Border Planning and Retirement Sustainability."

The full-day Conference brought together 20 government representatives, regulators, industry leaders and subject-matter experts from government, regulatory bodies, financial planning, asset management, retirement protection, family offices, technology, legal services, healthcare and insurance, attracting nearly 300 CFP® professionals and financial practitioners.

The Conference opened with welcoming remarks by Mr. Edwin Cheung, Chairman of IFPHK. Mr. Joseph Chan, JP, Under Secretary for Financial Services and the Treasury of the Government of the HKSAR, attended as Guest of Honour and delivered the opening remarks. Ms. Ginni Wong, Director (Supervision) of the Mandatory Provident Fund Schemes Authority (MPFA), delivered a keynote speech titled "MPF for a Better Future: Development, Transformation and the Way Forward."

Mr. Edwin Cheung, Chairman of the IFPHK said: "According to the Securities and Futures Commission's 2025 Asset and Wealth Management Activities Survey, the total assets under management of Hong Kong's asset and wealth management businesses grew by 20% year-on-year to reach HK$42.2 trillion, a record high. The Global Wealth Report 2026 also highlights that Hong Kong, with US$2.9 trillion in cross-border wealth in 2025, has for the first time become the world's largest cross-border wealth hub. These figures fully reflect Hong Kong's strength and resilience as an international asset and wealth management centre, and underscore the substantial development opportunities available to the local financial industry."

He added: "At the same time, individuals are facing increasingly complex financial decisions. Population ageing, longevity risk, rising healthcare costs, the growing prevalence of cross-border living and asset allocation, coupled with the rapid development of artificial intelligence and digital platforms, are all raising the bar for professional financial planning. In this fast-changing market environment, the professional judgment, integrative capabilities, and client-first ethics of CFP professionals are playing a pivotal role."

Mr. Joseph Chan, JP, Under Secretary for Financial Services and the Treasury, said in his opening remarks that under the "One Country, Two Systems", Hong Kong has the distinctive advantages of enjoying strong support of the Motherland and being closely connected to the world, Hong Kong has developed into a leading international financial centre and an international asset and wealth management hub. Hong Kong will continue to serve as a "super-connector" and "super-value-adder", actively consolidating its status as an international financial centre, deepening mutual market access with the Mainland, and facilitating the flow of cross-border capital, talent, and professional services, thereby opening up broader development space for professional services in asset management, family offices, retirement planning, and wealth succession.

Ms. Ginni Wong, Director (Supervision) of MPFA shared the latest developments of the MPF System and the eMPF Platform, as well as the ongoing initiatives in her keynote speech. She said that MPFA has been proactively implementing various reforms and enhancement measures over the years. MPFA will continue to uphold the principle of putting scheme members' interests first and actively advance various initiatives to enhance scheme members' retirement savings. She looks forward to continuing close collaboration with the financial planning sector for the retirement well-being of the working population in Hong Kong.

This year's conference continued to cover a range of topics closely relevant to Hong Kong residents and industry development, including retirement planning, long-term investment, family offices, artificial intelligence, cross-border wealth succession, medical inflation, and insurance planning. Ms. Ada Kung, Chief Investment Strategist at Sun Life Asset Management (HK) Limited, shared insights on the importance of long-term investment and retirement preparation under the theme "Long-Term Planning: Growing Your MPF, Building Your Future". Mr. Timothy Shen, Chairman of Safari Asia Group, then examined Hong Kong's positioning and advantages as a regional family office hub in his presentation titled "Hong Kong as a Family Office Hub: How to Capture Maximum Value?".

The morning session also featured an expert panel discussion "Locking in Yields and Embracing AI: Global Asset Rebalancing at a Turning Point," moderated by Mr. Steve Chiu, Former Chairman of IFPHK. Speakers included Mr. Charles Ma, Client Investment Strategist, Greater China, Allianz Global Investors; Mr. Nelson Shiu, Vice President, Account Manager, PIMCO Asia Limited; and Mr. Michael Wong, Senior Business Development Manager, Distribution Business, E Fund Management (HK) Co., Ltd. The discussion addressed the evolving interest-rate environment, investment opportunities, AI-driven market themes and global asset allocation considerations.

In the afternoon session, Panel II: "GBA Wealth Succession: Structures, Challenges and Opportunities" examined succession planning in the Greater Bay Area, including practical considerations for family governance, asset structuring, cross-border wealth transfer and legal planning. The panel was moderated by Mr. Paul Pong, Former Chairman and Current Board Member of IFPHK. Speakers included Ms. Fiona Fong, Partner, Financial Services at Deacon; Mr. Cliff Ip, Partner at Wings Capital and Dr. Amen Lee, President of Legacy Academy.

Panel III: "Robo Advisory Meets Family Legacy — Can Technology Replace the 'Human Touch'?" considered the role of robo-advisory platforms, digital wealth solutions and artificial intelligence in financial planning and family legacy advisory. The panel was moderated by Dr. Paris Yeung, Chief Executive Officer of IFPHK. Speakers included Dr. Emil Chan, Chairman of the Association of Cloud and Mobile Computing Professionals; Ms. Janet Hung, Head of Client Advisory Hong Kong at Endowus and Mr. Timothy Shen, Chairman of Safari Asia Group. The discussion explored how technology can enhance efficiency and accessibility while recognising the continued importance of trust, empathy and professional judgement in financial planning.

The Conference concluded with Panel IV: "Longevity Risk and Medical Inflation: Implications for Insurance Planning," moderated by Mr. Edwin Cheung, Chairman of IFPHK. Speakers included Dr. Kathy Chow, Head of Clinical Operations APAC at Bupa Global; Mr. Thomson Ho, Co-Founder of 10Life and Ms. Orchis Li, Former CEO of Health Mutual Group and Council Member of The Actuarial Society of Hong Kong. The panel examined how longer life expectancy, rising healthcare costs and medical inflation are reshaping insurance needs, protection planning and retirement security.

As IFPHK's flagship annual event, the Financial Planning Conference provides an important platform for financial planning professionals and industry stakeholders to exchange views on market trends, regulatory developments, client needs and professional standards. Through this year's theme, the Conference highlighted the increasingly important role of financial planners in helping individuals and families navigate a more complex wealth landscape, particularly as Hong Kong continues to strengthen its position as an international wealth management centre and family office hub.

IFPHK remains committed to advancing the professional development of financial planners, promoting high standards of practice, and supporting the sustainable growth of Hong Kong's financial planning and wealth management industry.

About IFPHK

IFPHK was established in June 2000 as a non-profit organization for the fast–growing financial industry. 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 236,000 CFP certificants in 29 regions; the majority of these professionals are in the U.S., China, Japan, Canada and Brazil. As at 28 February 2026, Hong Kong had approximately 3,238 CFP certificants.

At present, IFPHK has 5,298 members in Hong Kong including 956 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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Photos: https://photos.app.goo.gl/HxWwVXWeczBEmcs5A

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