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

FOR IMMEDIATE RELEASE

IFPHK Financial Education and ESG Leadership Awards Cum
Accredited Professional Financial Planning Firm 2026
Six Companies Receive Top Honour
New Decade of Excellence Award Recognises Sustained Commitment

(Hong Kong – 25 November, 2026) Organized by the Institute of Financial Planners of Hong Kong (IFPHK), the "IFPHK Financial Education and ESG Leadership Awards cum Accredited Professional Financial Planning Firm 2026" Awards Presentation Ceremony took place at JW Marriott Hong Kong on 23 November 2026.

The ceremony brought together more than 100 representatives and distinguished guests from the government, regulatory bodies, industry and non-profit organisations to celebrate six companies receiving the "Best Corporate Financial Education and ESG Leadership of the Year" honour. This year also saw the introduction of the "Accredited Professional Financial Planning Firm – Decade of Excellence Award", recognising companies for their sustained commitment to professional standards and quality financial planning services.

Under the theme "Excellence for Impact: Financial Literacy and ESG Leadership for Tomorrow", this year's awards not only recognised the contributions of outstanding organisations, but also sought to promote good industry practices, enhance public financial literacy and advance sustainable development. Through the "Accredited Professional Financial Planning Firm" awards, IFPHK also aims to encourage financial institutions to employ more qualified financial planning professionals who can help members of the public develop financial plans tailored to their individual needs, achieve their financial goals and enhance the overall well-being of society.

The Ceremony was honored to have Mr. Joseph Chan, JP, Under Secretary of Financial Services and the Treasury, HKSAR as the Guest-of-Honor. Mr. Kenneth Chan, Executive Director (Members and Supervision), Mandatory Provident Fund Schemes Authority and Mr. Daniel Leong, Executive Director and Chief Executive Officer, HKMC Annuity Limited also graced the ceremony as presenters.

Dr. Keith Yu, Chairman of IFPHK, commenced with a welcome speech. Dr. Yu highlighted the three key elements of this year's theme: professional excellence, financial literacy and ESG. He said: "These awards were established not only to recognise outstanding organisations, but also to encourage the industry to actively participate in the 'Financial Education and ESG Leadership Awards' and embed financial education, ESG principles and professional financial planning into everyday services and operations, delivering tangible benefits to the public."

He continued, "Through the 'Accredited Professional Financial Planning Firm' awards, we also hope to encourage financial institutions to employ qualified financial planning professionals who can help clients develop suitable and practical financial plans based on their financial means and family needs. We hope more organisations will draw on the valuable experience and proven practices of the award recipients and work together to give back to society, benefiting more members of the public."

The highest honor "Best Corporate Financial Education and ESG Leadership of the Year" was awarded to six companies, including Bank of Communications (Hong Kong) Limited, China Life Insurance (Overseas) Company Limited, Chow Tai Fook Life Insurance Company Limited, FWD Life Insurance Company (Bermuda) Limited, Prudential Hong Kong Limited and Sun Life Hong Kong Limited.

The newly introduced "Accredited Professional Financial Planning Firm – Decade of Excellence Award" was presented to AIA International Limited, FWD Life Insurance Company (Bermuda) Limited and Prudential Hong Kong Limited. AIA International Limited also received the "Accredited Professional Financial Planning Firm – Platinum Award" in recognition of employing the highest number of CFP certificants and AFP certificants.

The Awards was keenly supported by 14 supporting organizations, namely the Insurance Authority, Mandatory Provident Fund Schemes Authority, Financial Services Development Council, Investor and Financial Education Council, Actuarial Society of Hong Kong, CFA Society Hong Kong, CPA Australia, Hong Kong Institute of Certified Public Accountants, Hong Kong Investment Funds Association, Hong Kong Investor Relations Association, Institute of ESG and Benchmark, Macau Chinese Accountants Association, Macau Women Accountants Association and Association of Innovation and Entrepreneurship in the Guangdong-Hong Kong-Macao Greater Bay Area.

IFPHK Financial Education and ESG Leadership Awards cum

Accredited Professional Financial Planning Firm 2026

Best Corporate Financial Education and ESG Leadership of the Year
Bank of Communications (Hong Kong) Limited
China Life Insurance (Overseas) Company Limited
Chow Tai Fook Life Insurance Company Limited
FWD Life Insurance Company (Bermuda) Limited
Prudential Hong Kong Limited
Sun Life Hong Kong Limited

Corporate Financial Education and ESG Leadership – Gold Award
Bank of Communications (Hong Kong) Limited
China Life Insurance (Overseas) Company Limited
Chow Tai Fook Life Insurance Company Limited
Financial Dispute Resolution Centre
FWD Life Insurance Company (Bermuda) Limited
Hong Kong Family Welfare Society Financial Education Centre
Minimal Funeral Limited
Prudential Hong Kong Limited
Sun Life Hong Kong Limited
Resource Centre for Interdisciplinary Studies and Experiential Learning (RCISEL), The Education University of Hong Kong
Tung Wah Group of Hospitals Healthy Budgeting Family Debt Counselling Centre

Accredited Professional Financial Planning Firm
AIA International Limited
FWD Life Insurance Company (Bermuda) Limited
Prudential Hong Kong Limited
Sun Life Hong Kong Limited

Accredited Professional Financial Planning Firm - Decade of Excellence Award
AIA International Limited
FWD Life Insurance Company (Bermuda) Limited
Prudential Hong Kong Limited

Accredited Professional Financial Planning Firm - Platinum
AIA International Limited

Accredited Professional Financial Planning Firm - Silver
Prudential Hong Kong Limited

Accredited Professional Financial Planning Firm - Bronze
FWD Life Insurance Company (Bermuda) Ltd.
Sun Life Hong Kong Limited

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1		At the "IFPHK Financial Education and ESG Leadership Awards cum Accredited Professional Financial Planning Firm 2026" Awards Presentation Ceremony, about 100 guests celebrated financial education and financial planning excellence.
2		Mr. Joseph Chan, JP, Under Secretary of Financial Services and the Treasury, The Government of the Hong Kong SAR, graced the Ceremony as the Guest-of-Honor.
3		Dr. Keith Yu, Chairman of the IFPHK, specially commended the award-winning organisations for leveraging their respective strengths and setting an exemplary standard for the industry.
4		Bank of Communications (Hong Kong) Limited was awarded as the "Best Corporate Financial Education and ESG Leadership of the Year". Mr. Joseph Chan, JP, Under Secretary of Financial Services and the Treasury, HKSAR, presented the trophy to the award representative.
5		China Life Insurance (Overseas) Company Limited was awarded as the "Best Corporate Financial Education and ESG Leadership of the Year". Mr. Joseph Chan, JP, Under Secretary of Financial Services and the Treasury, HKSAR, presented the trophy to the award representative.

6		Chow Tai Fook Life Insurance Company Limited was awarded as the “Best Corporate Financial Education and ESG Leadership of the Year”. Mr. Joseph Chan, JP, Under Secretary of Financial Services and the Treasury, HKSAR, presented the trophy to the award representative.
7		FWD Life Insurance Company (Bermuda) Limited was awarded as the “Best Corporate Financial Education and ESG Leadership of the Year”. Mr. Joseph Chan, JP, Under Secretary of Financial Services and the Treasury, HKSAR, presented the trophy to the award representative.
8		Prudential Hong Kong Limited was awarded as the “Best Corporate Financial Education and ESG Leadership of the Year”. Mr. Joseph Chan, JP, Under Secretary of Financial Services and the Treasury, HKSAR, presented the trophy to the award representative.
9		Sun Life Hong Kong Limited was awarded as the “Best Corporate Financial Education and ESG Leadership of the Year”. Mr. Joseph Chan, JP, Under Secretary of Financial Services and the Treasury, HKSAR, presented the trophy to the award representative.
10		AIA International Limited was awarded as the “Accredited Professional Financial Planning Firm - Platinum”. Mr. Joseph Chan, JP, Under Secretary of Financial Services and the Treasury, HKSAR, presented the trophy to the award representative.

11		Guest-of-Honor, award presenters, guests and IFPHK representatives on stage. (From left) Dr. Samuel Yung, Honorary Member of IFPHK; Mr. Daniel Leong, CEO and Executive Director, HKMC Annuity Limited; Mr. Joseph Chan, JP, Under Secretary of Financial Services and the Treasury, HKSAR; Mr. Kenneth Chan, Executive Director (Members and Supervision), Mandatory Provident Fund Schemes Authority; Dr. Keith Yu, Chairman of IFPHK and Mr. Stephen Chan, Vice Chairman (Development) of IFPHK.
12		Awardees of the "Corporate Financial Education and ESG Leadership" and "Accredited Professional Financial Planning Firm" gathered with the presenters and guests for a group photo.

About IFPHK

IFPHK was established in June 2000 as a non-profit professional organization. It aims to be recognised in the region as a premier professional body representing financial planners dedicated to upholding the highest professional standards for the benefit of the public. The Institute is the sole licensing professional body in Hong Kong authorised by the Financial Planning Standards Board Limited in the US to grant CFP® certification and AFP® certification to qualified financial planning professionals in Hong Kong and Macau. Currently, there are more than 236,300 CFP certificants in 29 countries/regions; the majority of these professionals are in the U.S., Canada, China, Australia and Japan, and approximately 3,238 CFP certificants are in Hong Kong. It represents 5,863 financial planning practitioners in Hong Kong, including 1,088 Qualified Retirement Adviser. They are from such diverse professional backgrounds as banking, insurance, independent financial advisory, stockbroking, accounting, and legal services.

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