



PRESS RELEASE

IFPHK Financial Planning Conference 2014 Financial Planning Experts and Senior Figures on Driving New Growth

- Early Bird Discount Valid till Sept 5 -

(Hong Kong – 14 August, 2014) – Over a dozen senior figures of the financial planning industry, senior government officials and technology experts will impart their wisdom and experience at the IFPHK Financial Planning Conference 2014, to be held on 24 September 2014 at the Hong Kong Convention and Exhibition Centre. Early bird discount on Conference registration is valid till 5 September 2014.

The IFPHK Financial Planning Conference is one of the signature annual events of the Institute of Financial Planners of Hong Kong (IFPHK) to promote continuous learning and professional exchange in the financial services industry. Entitled “Driving New Growth” this year, the Conference invites financial industry leaders to share their insights on a wide range of current topics including regulatory updates on the MPF system and investment products, latest developments in the financial planning industry in Mainland China, internet finance in Mainland China, the future of digital financial planning, real estate forecast as well as investment opportunities in North Asia and the Mainland China market. It is expected that the Conference will attract about 500 CFP^{CM} professionals and financial planners.

Dennis Lau, Chief Executive Officer of the IFPHK, said “The financial services industry in Hong Kong plays a significant role in Hong Kong’s economy. According to the Hong Kong Annual Digest of Statistics 2013, the Hong Kong financial services industry employs about 6% of the workforce and contributes 16% of Hong Kong’s gross domestic product (GDP). To develop the business opportunities arising from the economic integration between Hong Kong and Mainland China, practitioners need to boost their knowledge of the Mainland China market. In addition, the Conference addresses the push for efficiency through the use of technology, and includes the topics of digitalizing the financial planning industry, as well as internet finance in Mainland China. We hope that through the Conference, practitioners can learn about the latest industry developments and technological advancements relevant to their professional space, so that they can stand out from the crowd and provide the most up-to-date, unbiased and effective service to clients.”

IFPHK Financial Planning Conference 2014

Theme : Driving New Growth
Date : 24 September 2014 (Wednesday)
Time : 9:30am – 5:00pm
Venue : Conference Room N201, HKCEC

Early Bird Discount: {Valid From 19 July to 5 Sept}

HK\$780 (Member) / HK\$1,300 (Non-Member)

Regular Fee: {Valid From 6 Sept}

HK\$980 (Member) / HK\$1,600 (Non-Member)

CE Recognition:

- 6 IFPHK CE Hours (including 1 compliance or ethics hour)
- 6 SFC CPT Hours
- 6 MPFA non-core CPD Hours
- 2 CPD IA Hours **subject to final approval*



Conference Contents

Keynote Speech	
The Latest Update on MPF System Ms. Cynthia Hui Executive Director (Supervision) Mandatory Provident Fund Scheme Authority	The Latest Regulatory Update Ms. Christina Choi Senior Director, Investment Products Securities and Futures Commission
Individual Presentation	
Investment Opportunities in North Asia and China Market Mr. Philip Li, CFA Fund Manager, Value Partners Limited	Professional Financial Planning Portal – The Change and Development of the “Golden Walking Stick” in Mainland China (Putonghua) Mr. Liang Lijun, Postdoctor, CTP General Manager, Beijing Financial World Technology Co., Ltd. Expert, Financial Education Research Institute of Beijing Financial Education Co., Ltd.
“Game of Zones” in Pilot Free-Trade Zone Dr. Eric Tsang President of China Law Research Association Committee Member of Guangdong Foreign Investment Law Society	The Future Development of Internet Finance in China (Putonghua) Dr. Yao Shaohua Senior Economist Hang Seng Bank Limited
The Future of Digital Financial Planning Mr. Andy Chen, EMBA, MEng, FRM, PMP Head of China Chappuis Halder & Co	Where Does the Property Market Go From Here? Mr. Derek Cheung, CPA Chief Executive Officer & Executive Director New Century Asset Management Limited Manager, New Century Real Estate Investment Trust
Discussion Forum	
Managing Client Asset in an Enhanced Synergy between Fund Managers and Platform Moderator ➤ Mr. Paul Pong, CFP ^{CM} Vice Chairman (Development) Institute of Financial Planners of Hong Kong Speakers ➤ Mr. Marco Tang Executive Director and Head of Retail Business China & Hong Kong Neuberger Berman Asia Limited ➤ Mr. Eddy Wong General Manager FundsUPERMART.com (Hong Kong)	Breaking into Financial Planning in Mainland China – The Experience of Hong Kong Firms Moderator ➤ Mr. Chris Tse, CFP ^{CM} Director, Asia, FTSE Group Speakers ➤ Dr. Chan Mou Fung, CFP (Hong Kong & China), CFA Managing Director Nobel Apex Advisors Limited ➤ Mr. Mark Mak, CFA, CPA, MBA Deputy CEO Convoy Financial Services Group

To know more about the conference, please visit IFPHK website: www.ifphk.org °

Media Enquiry

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About IFPHK

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

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^{CM} Certification and AFPTM Certification to qualified financial planning professionals in Hong Kong and Macau.

It represents more than 6,800 financial planning practitioners in Hong Kong from such diverse professional backgrounds as banking, insurance, independent financial advisory, stock broking, accounting, and legal services.

Currently there are more than 153,000 CFP certifiants in 25 countries/regions; the majority of these professionals are in the U.S., Canada, China, Australia and Japan, with more than 4,800 CFP certifiants in Hong Kong.