



Press Release

SCMP/IFPHK Financial Planner Awards 2014 Over 100 Winners Recognized for their Financial Planning Excellence

(Hong Kong – 22 October, 2014) Over 100 financial planning practitioners, university students and winning companies were awarded at the Awards Presentation Ceremony of the SCMP/IFPHK Financial Planner Awards 2014 (the “Awards”) yesterday (21 October). The recipient of the highest accolade in the financial planning industry - “Hong Kong Best Financial Planner of the Year 2014”, was also unveiled at the ceremony.

This year marks the tenth anniversary of the Awards. The Guest of Honour was the Honorable Professor K C Chan, GBS, JP, Secretary for Financial Services and the Treasury of the HKSAR Government. Joining him at the ceremony were Mr. Chris Tse, Chairman of IFPHK; Mr. Dennis Lau, CEO of IFPHK; Mr Wang Xiangwei, Editor-in-Chief, SCMP and 300 distinguished industry figures to celebrate the achievements of the Awards winners.

Jointly organized by the IFPHK and the SCMP, this industry signature event is the only competition covering the three major sectors of Banking, Independent Financial Advisory and Insurance. The Awards aim to recognize the outstanding performance of financial planning practitioners who excel in their professional skills and who uphold industry best practices. The University Student Category is open to university students who show their impressive promise in the financial planning arena.

In celebration of the tenth anniversary of the Awards and to encourage more financial industry firms and financial planning practitioners to take part in the Awards, two new awards, “Outstanding Company of the Year 2014” and “Best in Company” have been introduced this year to enthusiastic reception.

Mr Chris Tse, Chairman of IFPHK, was pleased to see that many of the participants and winners of the Awards went on to achieve success in their careers. The Awards this year also saw the highest industry participation rate in its ten-year history.

In his welcome remark, Mr Tse said, “Over the years, the Awards have become the benchmark to identify and bestow accolades on the talents and achievers of the financial services industry. The Awards have also helped to raise financial planning standards to higher levels. The winners gathered together tonight deserve our praise for their perseverance and excellent performance in upholding best practices in the financial planning industry. .”

He added, “This year, the “Outstanding Company of the Year 2014” and the “Best in Company”, awards have been introduced to encourage more financial industry firms and financial planning practitioners to take part in the Awards. We hope that these new awards offer a good opportunity for participants to demonstrate their commitment and dedication in pursuing professional excellence.”

Congratulations go to the following winners:

Practitioner Category

Hong Kong’s Best Financial Planner of the Year 2014

- Ng Ka Wai (Independent Financial Advisory Sector)

Industry Winners

- Chu Pui Shan (Banking Sector)
- Ng Ka Wai (Independent Financial Advisory Sector)
- Wong Sze Ling Sidney (Insurance Sector)

My Favourite Financial Planner of the Year 2014

- Chung Wai Ying (Independent Financial Advisory Sector)

Company Awards

Company for Financial Planning Excellence of the Year 2014

- Wing Lung Bank Limited (Banking Sector)
- Convoy Financial Services Limited (Independent Financial Advisory Sector)
- Manulife (International) Limited (Insurance Sector)

Outstanding Company of the Year 2014

- Manulife (International) Limited (Excellence in Practice)
- China Life Insurance (Overseas) Company Limited (Excellence in Performance)



University Student Category

- The Hong Kong University of Science and Technology (First Prize)
- The Chinese University of Hong Kong (Second Prize)
- Hong Kong Polytechnic University (Third Prize)

For details of the Awards and full list of winners, please visit the event website at <http://events.scmp.com/fpa2014>.

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 certificants in 25 countries/regions; the majority of these professionals are in the U.S., Canada, China, Australia and Japan, with more than 4,700 CFP certificants in Hong Kong.

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