

FOR IMMEDIATE RELEASE

**IFPHK Financial Education and ESG Leadership Awards Cum
Accredited Professional Financial Planning Firm 2023
16 Companies Accoladed
Financial Education and Professional Financial Planning Scaled up Financial Literacy**

(Hong Kong – 1 December, 2023) 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 2023” Awards Presentation Ceremony took place at The St. Regis Hong Kong on 28 November 2023. Over 100 prestigious guests from the government, regulatory, industry and nonprofit making sectors were seen at the occasion to celebrate collective effort in pro bono financial education. The awards recognized 16 companies, with five corporates crowned the highest honor “Best Corporate Financial Education and ESG Leadership of the Year”. They are AIA International Limited, China Life Insurance (Overseas) Company Limited, FTLife Insurance Company Limited, FWD Life Insurance Company (Bermuda) Limited and Prudential Hong Kong Limited.

The Ceremony was honored to have Mr. Joseph Chan, JP, Under Secretary of Financial Services and the Treasury, HKSAR as the Guest-of-Honor. Ms. Cynthia Hui, Chief Operating Officer and Executive Director of the Mandatory Provident Fund Schemes Authority and Mr. Andrew Wan, Chief Financial Officer of Securities and Futures Commission also graced the ceremony as presenters.

Mr. Chris Tse, Chairman of IFPHK, commenced with a welcome speech. Themed “Honoring Financial Education and ESG in the Digital Financial Landscape”, he highlighted that as digitalization becomes a manifest trend in ones’ lives and economies, customers will need higher financial sophistication to avoid fraud and costly mistakes. The award has seen awardees adopted measures to promote financial literacy but he commented that more effort is needed. He urged that regulators, industry players, and professional bodies to come together to develop strategies to promote digital financial education, especially for vulnerable groups.

At the same time, he also remarked that the awards have proven the IFPHK’s aspiration to encourage the industry players to sow seeds of financial education in the community. More companies are working tirelessly to promote financial education in all aspects. Thus, a record-breaking of five companies have been awarded with the grand prize of the awards.

Lastly, he reinforced that the IFPHK will remain committed to increasing public financial literacy through the cultivation of qualified financial planners. Hence, the Ceremony also honored six “Accredited Professional Financial Planning Firms”, who have safeguarded the highest standards for financial planning professionals.

The Awards was keenly supported by 14 supporting organizations, namely the Insurance Authority, Mandatory Provident Fund Schemes Authority, Investor and Financial Education Council, The Hong Kong Mortgage Corporation Limited, Financial Planning Standards Board, The Actuarial Society of Hong Kong, CFA Society Hong Kong, The Hong Kong Association of Banks, Hong Kong Institute of Bankers, Hong Kong Institute of Certified Public Accountants, Hong Kong Investment Funds Association, Hong Kong Investor Relations Association, Institute of ESG & Benchmark and the Kowloon Chamber of Commerce.

**IFPHK Financial Education and ESG Leadership Awards
Cum Accredited Professional Financial Planning Firm 2023**

Best Corporate Financial Education and ESG Leadership of the Year
AIA International Limited
China Life Insurance (Overseas) Company Limited
FTLife Insurance Company Limited
FWD Life Insurance Company (Bermuda) Limited
Prudential Hong Kong Limited
Corporate Financial Education and ESG Leadership – Gold Award
AIA International Limited
Bank of Communications (Hong Kong) Limited
China Life Insurance (Overseas) Company Limited
China Taiping Life Insurance (Hong Kong) Company Limited
FTLife Insurance Company Limited
FWD Life Insurance Company (Bermuda) Limited
Hong Kong Family Welfare Society Financial Education Centre
Hong Kong Metropolitan University
Principal Hong Kong
Prudential Hong Kong Limited
Sun Life Hong Kong
The Boys' & Girls' Clubs Association of Hong Kong
The Hang Seng University of Hong Kong
The Hong Kong and China Gas Company Limited
Tung Wah Group of Hospitals Healthy Budgeting Family Debt Counselling Centre
Accredited Professional Financial Planning Firm
AIA International Limited
Bank of Communications (Hong Kong) Limited
FWD Life Insurance Company (Bermuda) Limited
Manulife (International) Limited
Prudential Hong Kong Limited
Sun Life Hong Kong



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

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 213,000 CFP certificants in 27 countries/regions; the majority of these professionals are in the U.S., Canada, China, Australia and Japan, and approximately 4,000 CFP certificants are in Hong Kong. It represents 7,100 financial planning practitioners in Hong Kong, including 1,200 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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1		<p>超過 110 名嘉賓見證得獎者的誕生。</p> <p>Over 110 guests celebrated financial education and financial planning excellence at the Awards Presentation Ceremony.</p>
2		<p>財經事務及庫務局副局長陳浩濂先生,太平紳士擔任主禮嘉賓。他於台上祝賀各獲獎機構並感謝它們對社區理財教育的支持。</p> <p>Mr. Joseph Chan, JP, Under Secretary of Financial Services and the Treasury, HKSAR, graced the Ceremony as the Guest-of-Honor. He congratulated the award-winning companies and appreciated for their financial education contribution to the community.</p>
3		<p>香港財務策劃師學會主席謝汝康先生於致歡迎辭時特別表揚各得獎機構及人士的無私奉獻，身體力行提高市民的理財意識。</p> <p>The Ceremony commenced with a welcome speech delivered by Mr. Chris Tse, Chairman of IFPHK. He gave high regards to all awardees for their selfless contribution in raising financial literacy of the community.</p>

4		<p>友邦保險(國際)有限公司獲選為「年度最佳企業理財教育及 ESG 領袖」, 企業代表友邦香港及澳門內容營銷及推展部總監楊頌德先生從財經事務及庫務局副局長陳浩濂先生,太平紳士手中接過獎座。</p> <p>AIA International 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 Mr. John Yeung, Director, Content Marketing and Activation of AIA International Limited.</p>
5		<p>中國人壽保險(海外)股份有限公司獲選為「年度最佳企業理財教育及 ESG 領袖」, 企業代表中國人壽保險(海外)股份有限公司培訓部部門總經理黃舜健先生從財經事務及庫務局副局長陳浩濂先生,太平紳士手中接過獎座。</p> <p>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 Mr. Kent Wong, General Manager, Training Department of China Life Insurance (Overseas) Company Limited.</p>
6		<p>富通保險有限公司獲選為「年度最佳企業理財教育及 ESG 領袖」, 企業代表富通保險有限公司首席投資及資產負債總監陳朗輝先生從財經事務及庫務局副局長陳浩濂先生,太平紳士手中接過獎座。</p> <p>FTLife 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 Mr. Richard Chan, Chief Investment and Asset Liability Management Officer of FTLife Insurance Company Limited.</p>
7		<p>富衛人壽保險(百慕達)有限公司獲選為「年度最佳企業理財教育及 ESG 領袖」, 企業代表培訓及發展部主管鄧立平先生從財經事務及庫務局副局長陳浩濂先生,太平紳士手中接過獎座。</p> <p>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 Mr. Tennant Tang, Head of Training & Development of FWD Life Insurance Company (Bermuda) Limited.</p>

8		<p>保誠保險有限公司獲選為「年度最佳企業理財及 ESG 教育領袖」，企業代表保誠保險有限公司企業事務部主管方煒先生從財經事務及庫務局副局長陳浩濂先生,太平紳士手中接過獎座。</p> <p>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 Mr. Wayne Fong, Senior Director, Corporate Affairs of Prudential Hong Kong Limited.</p>
9		<p>主禮嘉賓、頒獎嘉賓及學會代表合照。</p> <p>左起：香港財務策劃師學會評估及監察委員會主席程俊昌先生、香港財務策劃師學會副主席（發展）龐寶林先生、香港財務策劃師學會行政總裁劉振輝先生、證券及期貨事務監察委員會（證監會）首席財務總監溫志遙先生、財經事務及庫務局副局長陳浩濂先生,太平紳士、強制性公積金計劃管理局（積金局）營運總監及執行董事許慧儀女士、香港財務策劃師學會主席謝汝康先生、香港財務策劃師學會前主席李澄幸先生及香港財務策劃師學會會員服務委員會主席余碩衡博士。</p> <p>Guest-of-Honor, award presenters and IFPHK representatives on stage.</p> <p>(From left) Mr. Gifford Chen, Chairman of the Assessment & Compliance Committee of IFPHK; Mr. Paul Pong, Vice Chairman (Development) of IFPHK; Mr. Dennis Lau, Chief Executive Officer of IFPHK; Mr. Andrew Wan, Chief Financial Officer of Securities and Futures Commission; Mr. Joseph Chan, JP, Under Secretary of Financial Services and the Treasury, HKSAR; Ms. Cynthia Hui, Chief Operating Officer and Executive Director of Mandatory Provident Fund Schemes Authority; Mr. Chris Tse, Chairman of IFPHK; Mr. Ray Lee, Former Chairman of IFPHK and Dr. Keith Yu, Chairman of the Member Services Committee of IFPHK.</p>
10		<p>「企業理財教育及 ESG 領袖」及「優質財策企業」的得獎代表與頒獎嘉賓大合照。</p> <p>Winners of the "Corporate Financial Education and ESG Leadership " and "Accredited Professional Financial Planning Firm” gathered with the presenters for a group photo.</p>