



註冊財務策劃師協會
Society of Registered Financial Planners

2015 会长报告

2015

THE PRESIDENT' S REPORT

2015年8月31日
31 August, 2015



组织架构 管理委员会

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给会员的话 MESSAGES TO MEMBERS

过去十四个年头，注册财务策划师协会在中港两地的发展充满惊喜且富挑战性；同时，印证着我人生的宝贵经验。在此，我衷心感谢理事们的支持，并欣然向大家扼要汇报在本人任内协会各项工作的进展及成果。

The course and developments of our Society in Hong Kong and China mainland in the past fourteen years have been full of surprises and challenges, and proves to be valuable experience in my life. With great supports from the Council of Management, hereby I present to you this report summarizing all that have been accomplished, what are brewing, and how progresses were made with respect to general operation during my term of office in the last 12 months.

会长 黄敏硕先生
Mr. Michael WONG
President
(2014 / 2015)

香港杰出大学生财务策划师比赛 HONG KONG UNDERGRADUATE FINANCIAL PLANNERS OF THE YEAR AWARD

本会自2011年举办首届以嘉许大学生具备卓越出色的「香港杰出大学生财务策划师比赛」后，喜见港澳大学生踊跃参加，反应热烈。本会去年继续举办这项具挑战性的学界比赛，让参赛学生充分发挥专业财务策划师的创意灵活潜能。是次比赛能够荣幸地邀请香港恒生管理学院(恒管)校长何顺文教授莅临颁奖典礼并担任主礼嘉宾，分享对香港财务策划行业发展的远见，让参赛同学从中获益良多，为未来财务策划事业作充分准备。

我谨代表本会衷心感谢各位专业评审，各参赛大学及同学的积极参与和投入，令比赛取得丰硕成果。「香港杰出大学生财务策划师比赛2015」由本年八月至十一月载誉举办，我们热切期待比赛继续写下成功一页，推动学界财务策划的专业发展。

Upon successful premier of the 2014 Hong Kong Undergraduates Financial Planning Award, in which overwhelming support and participation from universities in Hong Kong and Macau were recorded, our Society progressed into the 5th Award competition last year and this challenging event received yet another warm welcome from the academic institutions in the region, and Prof. Simon HO, President of Hang Seng Management College was invited as the guest of honor to the Award final and hosted the award ceremony as well as to share his visions and experience in the finance industry. The participants were well benefited in the course of the event and rewarded with necessary guidance to prepare them for a future career in financial planning.

I hereby on behalf of our Society pay tribute to our colleagues, industry professional advice and universities in the region for their support, making this Award a fruitful and meaningful event to the community. The Award is now in its fifth year and is well set for undergraduates to present their cases during the period from August 2015 to November 2015, we look forward to another year of success in this Award and hope this will make a positive impact to the financial planning sector.



财务策划教育 FINANCIAL PLANNING EDUCATION

为提高大众对财务策划专业的认知，本会理事亦被邀请于财务策划专业相关的活动分享行业经验和趋向。

For the purpose of stimulation of public awareness in financial planning profession, in the past fiscal year our councilors have been invited to participate in social activities with relative to the trade.

时间 Date	活动 Activities	主办 Organizers
2015年6月8日 8 June 2015	大时代下港股下半年的投资机遇和部署 Investment Dinner Talk Series	香港大学校友会 Hong Kong University Alumni Association



奖学金 SCHOLARSHIP

为鼓励成绩优异的学生，本会于2015年6月赞助香港专业教育学院(葵涌分校)工商管理学系之「注册财务策划师奖学金」。

We also sponsored the “HKRFP Scholarship” to the Department of Business Administration, Hong Kong Institute of Vocational Education (Kwai Chung) in June 2015, as an encouragement for those students excel in good academic attainment.





业界专业支持 PROFESSIONAL SUPPORT

本会对其它专业团体举办的财务策划界行业活动大力支持，提升财务策划专业化。

Another professional activity the Society engaged in was to promote professionalism of financial planning through different professional institutions.

时间 Date	活动 Activities	主办 Organizers
2014年11月21日 21 November, 2014	Valuation of Intangible Assets for Financial Reporting	The Association of Hong Kong Accountants
2015年1月30日 30 January, 2015	From an accountant to a CEO - my career path My CPA journey, what's next? What is the FUTURE of professional accountants in Hong Kong?	The Association of Hong Kong Accountants
2015年3月2日 2 March, 2015	2015/16 Budget Commentary – Accountants' Perspectives	Institute of Financial Accountants in Hong Kong
2015年3月12日 12 March, 2015	Insolvency Law and Practice – Basic Principles and Updates	The Association of Hong Kong Accountants
2015年4月16日 16 April, 2015	The Recent Development In The Taxation Environment And The Tax Audit In Hong Hong	Institute of Financial Accountants in Hong Kong
2015年5月11日 11 May, 2015	Investment Products For Corporates – Needs vs Risks	Institute of Financial Accountants in Hong Kong
2015年6月15日 15 June, 2015	沪深港通投资布阵 The Journey : HKBN From Startup to IPO Our Legal Unfair Competitive Advantage, our Co-Ownership 互联网金融2.0	The Association of Hong Kong Accountants
2015年6月22日 22 June, 2015	Top View From A Financial Accountant	Institute of Financial Accountants in Hong Kong
2015年6月30日 30 June, 2015	优秀企业风险战略管理奖 The Best Enterprise Risk Management Award	Academy of Professional Certification
2015年7月23日 23 July, 2015	外资企业如何成功挂牌上新三板	Institute of Financial Accountants in Hong Kong
2015年7月28日 28 July, 2015	The role of digital evidence in fraud cases and litigation	The Association of Hong Kong Accountants
2015年8月28日 28 August, 2015	ASEAN One Belt One Road拓展「东盟一带一路」	Institute of Financial Accountants in Hong Kong

部分资料只有中文/英文。

Some information is available in only Chinese/English.

除了担任业界活动的支持机构外,本会理事分别于不同主办活动中担任专业评审,积极支持及推动香港商界的专业发展。

Besides participating as a supportive organization, our councillors also acted as judges in activities of the financial planning industry and business management area.

时间 Date	活动 Activities	主办 Organizers
28 November, 2014	The Listed Enterprise Excellence Awards 2014	CAPITAL
16 October, 2014	都市盛世卓越品牌大奖 2014 Prime Awards for Brand Excellence 2014	都市盛世 Metro Prosperity
5 March, 2015	「香港最受欢迎品牌」2014颁奖典礼 Presentation ceremony of the Hong Kong Famous Brands 2014	亚洲品牌发展协会 Famous Brands Asia
1 April, 2015	第十五届资本杰出企业成就奖 The 15th CAPITAL Outstanding Enterprise Awards	CAPITAL



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专业讲座

PROFESSIONAL SEMINARS

过去十二个月，本会顺利地举办每月讲座，多元化的讲题以与财务策划工作相关为主，讲座喜获多间专业机构担任支持机构，当中包括香港会计人员总会、香港经济师学会、英国注册财务会计师公会香港分会、信息财务师协会、商业风险评估专业协会及专业认证学院。讲者的专业知识和出色的互动沟通技巧令会员获益良多，反应热烈。我们相信具前瞻性的讲座能持续且成功地建立互动平台，让专业讲者与从事财务策划行业的会员能互动交流。

In the past 12 months, our monthly seminars, with wide variety of topics related to financial planning services, were organized with great success. Thanks to the full support from a number of professional organizations, namely The Hong Kong Accounting Professionals Association, the Institute of Financial Accountants in Hong Kong, ITAccountants Association, The Institute of Crisis and Risk Management, The Society of Economists, and Academy of Professional Certification, all our seminars, in general, were warmly received by the attendants, responses were overwhelmingly positive, and there were good comments on the speaker's comprehensive knowledge on the subject, their delivery power, and interactive communication technique. Many of these talks are very visionary and have created an interactive platform between elite speakers and audience, composed mostly of practitioners in the financial planning profession.

时间 Date	活动 Activities	主办 Organizers
2014年9月25日 25 September, 2014	商品说明条例与你	柯晓宇律师 Mr. Hugo Ngaw Lawyer
2014年10月20日 20 October, 2014	沪港股票市场交易互联互通机制 (沪港通)	王汇材先生 香港交易及结算所有限公司 助理副总裁 Mr. Anthony Wong Assistant Vice President Hong Kong Exchanges and Clearing Limited
2014年11月30日 30 November, 2014	2015健康投资攻略	梁宝衡先生 气功师傅, 注册财务策划师协会理事 Mr. Dereke Leung Councillor of HKRFP, Chi Kung Master 萧凯怡女士 Green Monday 副总监萧凯怡 Ms. Elaine SIU Associate Director of Green Monday 刘子欣女士 Green Monday 营养师刘子欣 Ms. Celia LAU Nutritionist and Education Officer of Green Monday
2014年12月19日 19 December, 2014	浅谈香港财务策划行业的市场 新出路	梁永忠博士 企业学习顾问有限公司创办人及首席顾问 Dr. Joe LEUNG Principal Advisor of Organisational Learning Consultancy Limited

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时间 Date	活动 Activities	主办 Organizers
2015年1月29日 29 January, 2015	如何透过调解和仲裁有效解决商业纠纷	黄添伟先生 大律师及认可调解员 香港和解中心 Mr. Tim Wong Barrister-at-Law & Accredited Mediator HK Mediation Centre
2015年2月9日 9 February, 2015	2015上半年投资分析 2015 Investment Outlook	黄敏硕先生 康宏证券及资产管理董事 Mr. Michael M.S. WONG Director Securities & Asset Management, Convoy Asset Management Limited
2015年3月13日 13 March, 2015	如何利用Salesforce.com及Google Apps云端科技有系统地管理客户及提供更贴身的客户服务	黄以廷先生 Mr Terry Wong Senior Manager 曾启贤先生 Mr Eric Tsang Consultant Intro Limited
2015年4月21日 21 April, 2015	智能手机对眼睛的影响及都市人常见视觉问题	黄伟雄先生 专业事务总监 香港护眼 Mr. Jack WONG Professional Affairs Director EyeCare HK
2015年5月18日 18 May, 2015	中国A股市场和深圳创业板剖析 China A-share market and Shenzhen ChiNext board introduction	李梓维先生 机构客户部 资本市场经理 南方东英资产管理有限公司 Mr. Alvin Li Associate Capital Markets Institutional Client Group CSOP Asset Management
2015年6月10日 10 Jun, 2015	民事诉讼会遇到的陷阱 Pitfalls in Civil Litigation	张志宇律师 事务律师 张志宇律师行 Mr. Archie Cheung Principal of Cheung & Co., Solicitors
2015年7月14日 14 Jul, 2015	美元强势大时代何时结束?	陈健豪先生 高级副总裁 – 零售销售, 香港 ADS Securities Mr. Aaron Chan Senior Vice President – Retail Sales, HK ADS Securities
2015年8月14日 14 Aug, 2015	2015下半年投资分析 2015 Investment Outlook	黄敏硕先生 康宏证券及资产管理董事 Mr. Michael M.S. WONG Director Securities & Asset Management, Convoy Asset Management Limited



放眼财务策划发展

INSIGHT ON FINANCIAL PLANNING DEVELOPMENT

众所皆知，现今的经济衰退环境影响着全球市场发展，本会亦须要重新思考财务策划师的工作和角色如何在这复杂的经济环境下，符合客户实际的需要。为此，本人经常代表本会出席公众场合，发表意见，并不断地制定不同的工作，促进会员走向财务策划专业的卓越化，克服挑战和难关。

As we have come to aware, the current economic instability has an impact on businesses in global market. It is time to rethink the role and task of financial planner in catering aspiration to client's actual need in diverse economic developments. In this capacity, I did make frequent public appearances and speeches for the Society and on behalf of the interests of our members. We also consistently formulate different tasks and look for advancement and excellence for our members in the financial planning profession so as to overcome the challenging difficulties.

对社会的贡献

SOCIAL RESPONSIBILITY

值得欣喜，本会连续六年获香港社会服务联会颁发“同心展关怀5+”标志，嘉许本会持续于关怀社群、关怀员工及关怀环境之优秀表现。本会定必持续努力，履行社会责任和关爱。

We appreciate very much that The Hong Kong Council of Social Service has awarded us the Five Years Plus Caring Organization Logo, as recognition to our outstanding commitment in Caring for the Community, Caring for the Employees and Caring for the Environment over the past years. We will definitely continue to perform social responsibility in the community with caring and sustaining effort.



鸣谢

ACKNOWLEDGEMENT

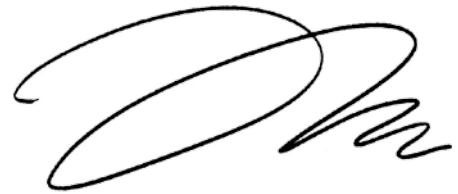
谨代表理事会同仁向本会赞助人和荣誉顾问衷心谢忱，感谢他们对协会的贡献，慷慨地付出宝贵建议和支持，这些都是推动本会成功发展的重要因素。

本人很荣幸能够为注册财务策划师协会服务，谨此向创会会长施德芝博士、各副会长：范维纲先生、马嘉阳小姐和锺伟雄律师、全体理事、秘书处、各小组委员会及资深会员们表达衷心的感谢，感谢你们对本人在任期间大力支持，全情投入会务。

最后，本人希望各位能继续支持来届理事会及日后协会举办之活动，并衷心祝愿协会稳步发展，进一步推动财务策划服务水平。

On behalf of the Council of Management, I would like to convey our hearty appreciation to our patrons and advisors, who had made contribution throughout the years. Their precious advice and support have always been the essential ingredients for the successful development of the Society.

Also, I would like to express my sincere appreciation to our Founder President - Dr. Sidney Sze, Vice Presidents - Mr. Michael Fan, Ms. Marggie Ma and Mr. Gerard Chung, the council members, the secretariat, sub-committees and fellow members for their unfailing efforts and remarkable commitment during the past year. Finally, I do enjoy my term in serving the Society to promote the professionalism of financial planning. I do hope that all of you will continue to support the upcoming new board and activities launched by the HKRFP.



会长 黄敏硕先生
Mr. Michael WONG
President
(2014 / 2015)

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