

Organizer

Society of Registered Financial Planners

Hong Kong Undergraduate Financial Planners of the Year Award 2016

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(November 22, 2016, Hong Kong) –“Hong Kong Undergraduate Financial Planners of the Year Award 2016” (The Award) organized by Society of Registered Financial Planners ("HKRFP"). The Award are to raise awareness of financial planning among university students, equip them with adequate knowledge for a career in the financial planning industry, provide encouragement and recognition to outstanding participants, and promote professional standards and quality in financial planning.

The competition went through three rounds. Participating teams were asked to submit a detail financial proposal and written report on one real-life financial planning case in the round one. Entries were then assessed in accordance to five criteria, namely, the effective application of client information, formulation of financial goals, construction of a comprehensive financial proposal, risk analysis, and presentation layout. The selected top 12 teams from the first round would then advance to Round Two, in which each team was requested to submit a video presentation alongside with a set of power-point slides on the written case presented as per Round One. In the Final Round, each team had to provide their arguments on the "In creating financial plans, how and why should financial planners account for the risks and opportunities associated with the US Presidential Election of 2016?" in front of the panel of judges.

The Society of Registered Financial Planners ("HKRFP") announces winners of the "Hong Kong Undergraduate Financial Planners of the Year Award 2016". It's honored for the HKRFP to have invited Dr. Maggie Koong, BBS, Chief Principal of Victoria Educational Organisation to officiate the “Hong Kong Undergraduate Financial Planners of the Year Award 2016” Final Round and Award Presentation Ceremony on 19 November, 2016. Upon careful screening and audit of 70 submitted cases, conducted by a panel of judges of experts and veterans from the financial community, the following teams have been selected to be the winners of the competition 2016:

University	Team Name	Members	Prize
The Chinese University of Hong Kong	The Wizards of Wall Street	YANG Huai Wei, WANG Hsuan I WANG Cheng Wei, CHEN Yu Ting	Champion
City University of Hong Kong	Stimulus	Atishray Deepak Malhan Vipul Vijayavargiya, Sandeep Sharma	1st Runner-up
City University of Hong Kong	Elites	WAN Lai Wan, YUAN Zixuan LAU Sin Ting	2nd Runner-up
The Chinese University of Hong Kong	JMAC	CHEN Chien Shao, HUANG Chih Yu LAI Cheng Han, CHOU Chih Liang	3rd Runner-up
University	Team Name	Member	Prize
City University of Hong Kong	Stimulus	Vipul Vijayavargiya	Best Presenter Award

The following four teams have been awarded "Certificate of Excellent Presentation" for their outstanding presentation preparation and technique*:

University	Team Name	Members
The Chinese University of Hong Kong	Precision X	YU Chun Fung Ray, TSUI Chun Wong, HO Ka Ming, PUN Man Wing
The Chinese University of Hong Kong	Quantitative Planner	CHEUNG Ka Ho, FONG Cheong

		Ching, SONG Shi Yu, CHOW Yik Ming
City University of Hong Kong	Stimulus	Atishray Deepak Malhan Vipul Vijayavargiya, Sandeep Sharma
The Chinese University of Hong Kong	The Wizards of Wall Street	YANG Huai Wei, WANG Hsuan I WANG Cheng Wei, CHEN Yu Ting

(*In alphabetical order of team name)

The following twelve teams have been awarded "Certificate of Merits" for their efforts in compilation of professional financial proposals: **

University	Team Name	Members
Hong Kong Shue Yan University	AM SQUARE	YEUNG Pui Shan, POON Tak In, TO Wan Yee, CHOI On Kiu
City University of Hong Kong	Blue chip	ZHANG Xinrui, YU Ling, ZHANG Xuan
City University of Hong Kong	Elites	WAN Lai Wan, YUAN Zixuan, LAU Sin Ting
Hong Kong Shue Yan University	HAPPY	CHAN Ka Lun, CHOI Ka Hing, LAM Kei Man, CHAU Chun Sing
The Chinese University of Hong Kong	JMAC	CHEN Chien Shao, HUANG Chih Yu, LAI Cheng Han, CHOU Chih Liang
The Chinese University of Hong Kong	Precision X	YU Chun Fung Ray, TSUI Chun Wong, HO Ka Ming, PUN Man Wing
The Chinese University of Hong Kong	Quantitative Planner	CHEUNG Ka Ho, FONG Cheong Ching, SONG Shi Yu, CHOW Yik Ming
Hong Kong Shue Yan University	ROCKET TEAM	YANG Wai Shek, CHENG Yan Tung, TING Chin Wang, YIP Chi Kam
City University of Hong Kong	Stimulus	Atishray Deepak Malhan, Vipul Vijayavargiya, Sandeep Sharma
Hong Kong Shue Yan University	TCGS	TSOI Ying Fai, CHAN Man Sin, GU Zuhui, SOON Lee Ki
Hang Seng Management College	The Killers	TANG Hiu Lee, TAN Anjelica Chui, YUEN Sze Hang
The Chinese University of Hong Kong	The Wizards of Wall Street	YANG Huai Wei, WANG Hsuan I, WANG Cheng Wei, CHEN Yu Ting

(**In alphabetical order of team name)

It's honored to have professional panel of judges, supporting associations and organizations to officiate the ceremony. Their kind support has helped make the award fruitful and successful.

Panel of Judges (In alphabetical order)	Title
Dr. Anthony Tam (Chairman of the judges)	Senior Education Consultant of Pearson Qualifications International
Mr. Alex Ku	Vice President of Hong Kong Society of Economists
Ms. Daisy Lo	Director of Hong Kong Securities and Investment Institute
Mr. Francis Lun	Permanent Honorary Chairman of The Hong Kong Institute of Financial Analysts and Professional Commentators Limited
Dr. Kenny Tang	Chairman of The Hong Kong Institute of Financial Analysts and Professional Commentators Limited
Mr. Michael Wong	President of Society of Registered Financial Planners, Director of Convoy Asset Management Limited



Supporting Organizations / Associations (In alphabetical order)

Hong Kong Institute of Investors
Hong Kong Securities and Investment Institute
Hong Kong Securities Association Limited
Hong Kong Society of Economists
The Actuarial Society of Hong Kong
The Hong Kong Federation of Insurers
The Hong Kong Institute of Financial Analysts and Professional Commentators Limited
The Hong Kong Management Association
The Hong Kong Productivity Council
The Institute of Crisis and Risk Management
The Taxation Institute of Hong Kong
Tung Wah Group of Hospitals – Health Budgeting Family Debt Counselling Centre



For enquiries, please contact:

Society of Registered Financial Planners (HKRFP)

Miss Koey Tong Tel: (852) 3105-1744 Fax: (852) 2186 7136 Email: info@hkrfp.org

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About Society of Registered Financial Planners (HKRFP)

Society of Registered Financial Planners (HKRFP) is a non-profit organization established in 2001 for the promotion of professionalism within the financial planning industry and raise of public awareness of the value of financial planning services. As the pioneer in financial planner profession, it is the first organization to organize an annual award for financial planners in both Hong Kong and China, and set up the Recognition of Financial Planner (RFP) Index to study the awareness, attitudes, and user behaviors of Hong Kong people towards professional financial planner services. HKRFP works closely with renowned institutions in organizing various examinations and education programs for its members in Hong Kong and China. HKRFP's patrons include Sir David AKERS-JONES, ^{GBM}KBE JP, and Dr. Edmund Tse, ^{GBS}.

For more information on HKRFP, please visit <http://www.hkrfp.org>