

Organizer

Society of Registered Financial Planners

Hong Kong Undergraduate Financial Planners of the Year Award 2017

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(November 20, 2017, Hong Kong) –“Hong Kong Undergraduate Financial Planners of the Year Award 2017” (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 13 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 topic "**How to beat or cope with ChatBot (Robots that answer and response like human but with a super brain) in the AI transformation in Financial Planning Industry.**

***Many telephone operations are replaced by chatbot these days. So starting are the legal professions, at least in the USA, and many white collar jobs. Professionals in the financial sector are shaking. AI and robots are coming. What is it in us that they cannot do or think better? Especially in that AI don't lie, they are patient, and they can prepare a tailor make portfolio for clients in seconds. As a new era financial planner, what will you plan to govern AI or override chatbots?***" 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 2017”. It's honored for the HKRFP to have invited Dr. Raymond Ho Chung-tai, SBS, MBE, SBStJ, JP, Chairman of Dashun Foundation and Belt & Road Global Development Alliance and the former Member of Legislative Council of Hong Kong to officiate the “Hong Kong Undergraduate Financial Planners of the Year Award 2017” Final Round and Award Presentation Ceremony on 18 November, 2017. Upon careful screening and audit of 62 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 2017:

University	Team Name	Members	Prize
City University of Hong Kong	JEHL	DENG Yuqian, WEI Jiaming, PAN Minwen, ZHAN Chenkai	Champion
Hang Seng Management College	Tate's Cairn	CHAN Yat Hei, LI Ka Lok, HEUNG Mun Wa, SUEN Yuk Ching	1st Runner-up
City University of Hong Kong	ZERO	ZHAO Manqi, WAN Xiaonan, ZHAO Jiaying, ZHANG Chuhao	2nd Runner-up
City University of Hong Kong	Wolverine	CHAN Yu Hin Ivan, CHAN Tsz Hong, YAN Tsz Yiu, CHAN Yam Tsz	3rd Runner-up
University	Team Name	Member	Prize
City University of Hong Kong	JEHL	DENG Yuqian	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
City University of Hong Kong	JEHL	DENG Yuqian, WEI Jiaming, PAN Minwen, ZHAN Chenkai
Hong Kong Shue Yan University	Sold Team	WONG Wing Leong, AU Tsz Yin, YIP Hiu Man, CHAN Kai Yin
City University of Hong Kong	Wolverine	CHAN Yu Hin Ivan, CHAN Tsz Hong, YAN Tsz Yiu, CHAN Yam Tsz
City University of Hong Kong	ZERO	ZHAO Manqi, WAN Xiaonan, ZHAO Jiaying, ZHANG Chuhao

(\*In alphabetical order of team name)

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

University	Team Name	Members
The Hong Kong University of Science and Technology	Finnection	LO Chi Ming, CHAN Ho Yee Chris, FUNG Nga Kei, CHAN Kai Him
City University of Hong Kong	FinStrate	HO Ho Ming, KWAN Pui Chung, FOK Tsz Ying
Hang Seng Management College	Incredible	CHEUNG Yan Ting, CHIU Sung Hei, CHEUNG Tsz Kwan, MO Man Ching
Hong Kong Shue Yan University	Influence	LAM Ying Yau, CHENG Yuen Yan, TSOI Tsz Kin
City University of Hong Kong	JEHL	DENG Yuqian, WEI Jiaming, PAN Minwen, ZHAN Chenkai
City University of Hong Kong	Optimum	LI Chenwenting, WANG Suyuan, LIU Mengqian
Hong Kong Shue Yan University	Sold Team	WONG Wing Leong, AU Tsz Yin, YIP Hiu Man, CHAN Kai Yin
City University of Hong Kong	Speedster	SHENG Jiechao, XU Bingze, BAO Zhujun, XIONG Weilin
Hong Kong Shue Yan University	Symphony	FOO Kai Man, Ken, LEE Hoi Yi, Bethany, CHUNG Wing Shan, Regina, CHAN Tsz Wai, Yetta
Hang Seng Management College	Tate's Cairn	CHAN Yat Hei, LI Ka Lok, HEUNG Mun Wa, SUEN Yuk Ching
City University of Hong Kong	The Winners	IP Oi Ling Crystal, HEO Ching Fung, WONG Long Yin
City University of Hong Kong	Wolverine	CHAN Yu Hin Ivan, CHAN Tsz Hong, YAN Tsz Yiu, CHAN Yam Tsz
City University of Hong Kong	ZERO	ZHAO Manqi, WAN Xiaonan, ZHAO Jiaying, ZHANG Chuhao

(\*\*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.



<b>Panel of Judges (In alphabetical order)</b>	<b>Title</b>
Dr. Anthony Tam (Chairman of the judges)	Former President, CUHK-TWGH Community College, Education Consultant
Mr. Michael Fan	Honorary Life President of Hong Kong Society of Economists
Dr. Perry IP	Former Vice Chairman of Hong Kong Quality Management Association
Ms. Ruth Kung	Chief Executive of Hong Kong Securities and Investment Institute
Mr. Simon Lam	Permanent Honorary Chairman of The Hong Kong Institute of Financial Analysts and Professional Commentators Limited
Dr. Gordon Tsui, JP	Vice Chairmen of Hong Kong Securities Association Limited
Mr. Michael Wong	President and UFP award 2017 Chairman of Society of Registered Financial Planners

<b>Supporting Organizations / Associations (In alphabetical order)</b>
The Actuarial Society of Hong Kong
The Hong Kong Management Association
The Hong Kong Productivity Council
Hong Kong Securities and Investment Institute
The Institute of Crisis and Risk Management
Tung Wah Group of Hospitals – Health Budgeting Family Debt Counselling Centre

Hong Kong Institute of Investors
The Taxation Institute of Hong Kong
Hong Kong Society of Economists
The Hong Kong Federation of Insurers
Hong Kong Securities Association Limited
The Hong Kong Association of Financial Advisors
The Hong Kong Institute of Financial Analysts and Professional Commentators Limited

**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>



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