



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

2017 會長報告 2017 THE PRESIDENT'S REPORT

2017年8月25日
25 August, 2017



組織架構 管理委員會

創會會長
施德芝博士

會長
黃敏碩先生

副會長
范維綱先生
梁廣雄先生
鍾偉雄律師

名譽秘書
何志成先生

名譽司庫
何焯新先生

理事
龍松榮先生
霍錦就先生
梁寶衡先生
黃毓平博士

Organization Structure Management Council

Founder President
Dr. Sidney Sze

President
Mr. Michael Wong

Vice Presidents
Mr. Michael Fan
Mr. Calvin Leung
Mr. Gerard Chung

Honorary Secretary
Mr. Simon Ho

Honorary Treasurer
Mr. Stephen Ho

Councilors
Mr. Alex Lung
Mr. Peter Fok
Mr. Derek Leung
Dr. Clement Wong



給會員的話 MESSAGE TO MEMBERS

過去十六個年頭，註冊財務策劃師協會在中港兩地的發展充滿驚喜且富挑戰性，同時印證著我人生的寶貴經驗。在此，我衷心感謝理事們的支持，並欣然向大家扼要彙報在本人任內協會各項工作的進展及成果。

The course of development of our Society in Hong Kong and mainland China in the past sixteen years has been filled with surprises and challenges, and it adds knowledgeable and valuable experiences to my growing self. With great support from the Council of Management, I hereby present to you this report, summarizing all that have been accomplished and are well-worth to be recorded in my term of office.

會長 黃敏碩先生
Mr. Michael WONG
President
(2016 / 2017)



香港傑出大學生財務策劃師比賽 HONG KONG UNDERGRADUATE FINANCIAL PLANNERS OF THE YEAR AWARD

本會自2011年舉辦首屆以嘉許大學生具備卓越出色的「香港傑出大學生財務策劃師比賽」後，喜見港澳大學生踴躍參加，反應熱烈。本會去年繼續舉辦這項具挑戰性的學界比賽，讓參賽學生充分發揮專業財務策劃師的創意靈活潛能。是次比賽能夠榮幸地邀請維多利亞教育機構總校長孔美琪博士蒞臨頒獎典禮並擔任主禮嘉賓，分享對財務策劃行業發展及教育的遠見，讓參賽同學從中獲益良多，為未來財務策劃事業作充分準備。

我謹代表本會衷心感謝各位專業評審，各參賽大學及同學的積極參與和投入，令比賽取得豐碩成果。「香港傑出大學生財務策劃師比賽2017」由本年八月至十一月載譽舉辦，我們熱切期待比賽繼續寫下成功一頁，推動學界財務策劃的專業發展。

Beginning with the success of the Hong Kong Undergraduates Financial Planning Award in 2011, overwhelming support and participation from universities in Hong Kong and Macau have since been recorded. Last year, our society walked tall into its 6th anniversary competition and the event received yet another unprecedented hurrah from the academic institutions in the region. Dr. Maggie KOONG, Chief Principal of Victoria Educational Organization was invited as the Guest of Honor to the award ceremony to share her experience in career development and visions in education in the financial planning industry. The participants were benefited a lot from the event and this surely would better prepare them for their future career in financial planning.

I hereby pay tribute to our colleagues, judges, universities and their students for their support in making this Award a fruitful and meaningful event to the community. The Award is now in its seventh year and is in its implementation from August 2017 to November 2017. We look forward to another year of success in this Award and hope this will make another big positive impact to the financial planning sector in Hong Kong and China.



獎學金 SCHOLARSHIP

為鼓勵成績優異的學生，本會於2016年12月贊助香港專業教育學院(柴灣、黃克競分校)之「註冊財務策劃師獎學金」。

We granted the “HKRFP Scholarship” to outstanding students of the Hong Kong Institute of Vocational Education, Mr. Chai Wan and Mr. Haking Wong, in December 2016, as recognition to their academic achievement.



對社會的貢獻 SOCIAL RESPONSIBILITY

值得欣喜，本會獲香港社會服務聯會頒發“同心展關懷10+”標誌，嘉許本會持續於關懷社群、關懷員工及關懷環境之優秀表現。此外，本會亦於2016年獲得了由勞工及福利局社區投資共享基金主辦之“2016社會資本動力獎”。本會定必持續努力，履行社會責任和關愛。

We have been granted The Hong Kong Council of Social Service Ten Years Plus Caring Organization Logo, as an acknowledgement to our outstanding commitment in caring for our community, employees, and environmental issues. In addition, we received “Social Capital Builder (SCB) Awards” from the Labor and Welfare Bureau Community Investment and Inclusion Fund (CIIF) in 2016. We will definitely continue to guard and uphold our social responsibility with care for the community.





業界專業支持 PROFESSIONAL SUPPORT

本會對其它專業團體舉辦的財務策劃界行業活動大力支持，提升財務策劃專業化。

We have made supports to the activities of other entities in the financial planning sector to promote professionalism in financial planning.

| 時間 Date | 活動 Activities | 主辦 Organizers |
|---------------------------------|---|---|
| 2016年10月25日 25 October 2016 | 銀行及金融服務企業獎2016 Metro Awards for Banking & Finance Corporations | 《都市日報》及《都市盛世》 Metro Daily and Metro Prosperity |
| 2016年11月15日 15 November 2016 | 「香港最受歡迎品牌」2016品牌巡禮 Hong Kong Famous Brands 2016 | MeeeeepMore |
| 2016年11月17日 17 November 2016 | 傑出上市企業獎 2016 Listed Enterprise Awards 2016 | 彭博商業周刊/ 中文版 Bloomberg Businessweek/Chinese Edition |
| 2017年1月11日 11 January 2017 | 優秀上市公司大獎2016 | 《都市日報》及《都市盛世》 Metro Daily and Metro Prosperity |
| 2017年2月22日 22 February 2017 | 都市卓越品牌大獎2016 Metro Awards For Brand Excellence | 《都市日報》及《都市盛世》 Metro Daily and Metro Prosperity |
| 2017年4月20日 20 April 2017 | 「香港最受歡迎品牌」頒獎典禮 2016 Hong Kong Famous Brands 2016 | 亞洲品牌發展協會 Hong Kong Famous Brands |
| 2017年4月28日 28 April 2017 | 金融機構大獎2017 Financial Institution Awards 2017 | 彭博商業周刊/ 中文版 Bloomberg Businessweek/Chinese Edition |
| 2017年8月29日 29 August 2017 | 「香港最受歡迎品牌」2017品牌巡禮 Hong Kong Famous Brands 2017 | MeeeeepMore |
| 2017年9月8日 8 September 2017 | 都市傑出服務大獎2017 Metro Award for Service Excellence 2017 | 《都市日報》及《都市盛世》 Metro Daily and Metro Prosperity |



部分資料只有中文/英文。

Some information is available only in Chinese/English.

除了擔任業界活動的支持機構外，本會亦派出理事分別於不同主辦活動中擔任專業評審，積極支持及推動香港商界的專業發展。

Our society had supported various activities in the financial planning sector. In addition, our councillors had also acted as judges in many of these activities to promote business management.

| 時間 Date | 活動 Activities | 主辦 Organizers |
|---------------------------------|--|---|
| 2016年10月25日 25 October 2016 | 銀行及金融服務企業獎2016* Metro Awards for Banking & Finance Corporations | 《都市日報》及《都市盛世》 Metro Daily and Metro Prosperity |
| 2016年11月8日 8 November 2016 | Banking & Finance Awards 2016 | 《晴報》 Skypost |
| 2016年11月15日 15 November 2016 | 「香港最受歡迎品牌」2016品牌巡禮* Hong Kong Famous Brands 2016 | MeeeeeepMore |
| 2016年12月7日 7 December, 2016 | 領先基金大獎 2016 Top Fund Awards 2016 | 彭博商業周刊/ 中文版 Bloomberg Businessweek/Chinese Edition |
| 2017年1月11日 11 January 2017 | 優秀上市公司大獎2016* | 《都市日報》及《都市盛世》 Metro Daily and Metro Prosperity |
| 2017年2月22日 22 February 2017 | 都市卓越品牌大獎2016* Metro Awards For Brand Excellence | 《都市日報》及《都市盛世》 Metro Daily and Metro Prosperity |
| 2017年4月20日 20 April 2017 | 「香港最受歡迎品牌」頒獎典禮 2016* Hong Kong Famous Brands 2016 | 亞洲品牌發展協會 Hong Kong Famous Brands |
| 2017年4月28日 28 April 2017 | 金融機構大獎2017* Financial Institution Awards 2017 | 彭博商業周刊/ 中文版 Bloomberg Businessweek/Chinese Edition |
| 2017年8月29日 29 August 2017 | 「香港最受歡迎品牌」2017品牌巡禮* Hong Kong Famous Brands 2017 | MeeeeeepMore |
| 2017年9月8日 8 September 2017 | 都市傑出服務大獎2017* Metro Award for Service Excellence 2017 | 《都市日報》及《都市盛世》 Metro Daily and Metro Prosperity |



部分資料只有中文/英文。
Some information is available only in Chinese/English.

*本會為活動支持機構，亦派理事擔任評審委員。
HKRFP participated as a supportive organization in the activities.
Our councillors also acted as judges in the activities.



部分資料只有中文/英文。

Some information is available in only Chinese/English.

專業講座

PROFESSIONAL SEMINARS

過去十二個月，本會順利地舉辦每月講座，多元化的講題以與財務策劃工作相關為主，講座喜獲多間專業機構擔任支持機構，當中包括香港會計人員總會、香港經濟師學會、商業風險評估專業協會、專業認證學院及香港財務顧問協會。講者的專業知識和出色的互動溝通技巧令會員獲益良多，反應熱烈。我們相信具前瞻性的講座能持續且成功地建立互動平台，讓專業講者與從事財務策劃行業的會員能互動交流。

In the past 12 months, our monthly seminars, which came with a 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 Society of Economists, The Institute of Crisis and Risk Management, Academy of Professional Certification and The Hong Kong Association of Financial Advisors. Our seminars were warmly welcomed by the attendants. Responses were overwhelmingly positive, and applauses were abundant to the speakers for their professional knowledge and interactive communications in seminars. Many of these talks were very visionary and created interactive platforms among the speakers and the audience on practices in financial planning.

| 時間 Date | 活動 Activities | 主辦 Organizers |
|----------------------------------|---|---|
| 2016年9月9日 9 September, 2016 | Beyond The Financial Performance and Figures: Rejuvenating an Aging Organisation-How Companies Can Survive in a Highly Competitive and Changing Market? | 梁永忠博士 機構創辦人及首席顧問 Dr. Joe Leung Founder and Principal Consultant of Organisational Learning Consultancy Limited |
| 2016年10月13日 13 October, 2016 | 美國總統大選前夕的美股及深港通機遇 | 陳志豪先生 業務拓展總監 特許財務分析師 華夏基金(香港)有限公司 Mr. Vincent Chen Director, Business Development of China Asset Management (Hong Kong) Limited |
| 2016年11月10日 10 November, 2016 | Essential Asset Management Update: HK Regulatory Developments | 柯曉宇 律師 康宏金融控股有限公司 Mr. Hugo Ngaw Group Legal Counsel Convoy Financial Services Limited |



部分資料只有中文/英文。
Some information is available only in Chinese/English.

| 時間 Date | 活動 Activities | 主辦 Organizers |
|---------------------------------|---|--|
| 2017年1月17日 17 January, 2017 | 深港通：連接中國的新篇章 | 閻景來先生 港交所助理副總裁 Mr. Frederick Yim Assistant Vice President of Hong Kong Exchanges and Clearing Ltd. |
| 2017年2月15日 15 February, 2017 | 2016上半年投資分析 2016 Investment Outlook | 黃敏碩先生 康宏證券及資產管理董事 Mr. Michael M.S. WONG Director Securities & Asset Management, Convoy Asset Management Limited |
| 2017年3月2日 2 March, 2017 | 性格影響命運，知彼知己？ 從西方古數字智慧看性格、 今生…… | 鍾偉雄律師 數字學教師 註冊財務策劃師協會副會長 Mr. Gerard Chung Numerology Teacher Vice President of HKRFP |
| 2017年4月26日 26 April, 2017 | 2017年下半年香港樓市走勢 | 葉景強先生 香港按揭顧問創辦人 Mr. King Yip(King Sir) Managing Director of Hong Kong Mortgage Consultants Limited |
| 2017年5月22日 22 May, 2017 | 「一帶一路」帶給香港的金 融機遇 | 何鍾泰博士 大舜政策研究中心主席 Dr Raymond Chung-tai Ho Chairman of Dashun Foundation and Belt & Road Global Development Alliance |
| 2017年6月20日 20 June, 2017 | Housing Market Outlook and Policy Implications | 曾維謙先生 團結香港基金高級研究員 Mr. William Tsang Wai-him Senior Researcher of Our Hong Kong Foundation 葉文祺先生 團結香港基金研究員 Mr. Ryan Ip Man-ki Researcher of Our Hong Kong Foundation |
| 2017年8月31日 31 August, 2017 | China Capital Markets – the latest | 姚嘉仁先生 北京高華證券有限責任公司總經理兼首席運營官 Mr. Wilfred Yiu Ka Yan Deputy chief executive officer and chief operating officer for Beijing Gao Hua Securities (in alliance with Goldman Sachs) |

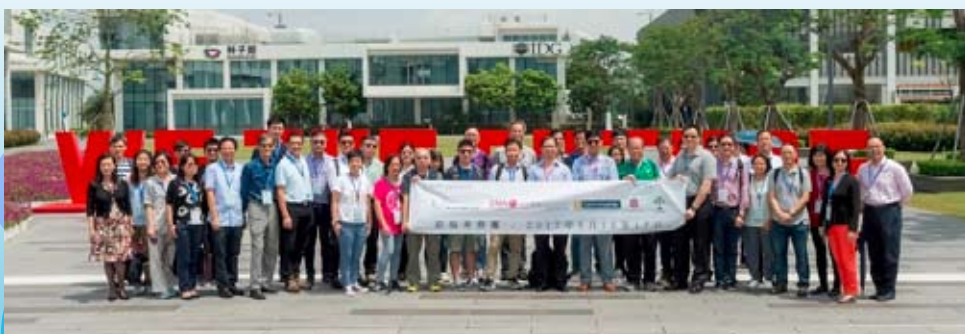


放眼財務策劃發展

INSIGHT INTO FINANCIAL PLANNING DEVELOPMENT

眾所皆知，現今的經濟衰退環境影響著全球市場發展，本會亦須要重新思考財務策劃師的工作和角色如何在這複雜的經濟環境下，符合客戶實際的需要。為此，本人經常代表本會出席公眾場合，發表意見，並不斷地制定不同的工作，促進會員走向財務策劃專業的卓越化，克服挑戰和難關。

As we have come to aware, the current economic instability has an impact on global businesses. It is time to rethink the roles and tasks of financial planners in focusing on and catering for the clients' actual needs. In this capacity, I did make frequent public appearances and speeches on behalf of the interests of our members and for the Society. We also had consistently formulate different tasks and sought for advancement and excellence in the financial planning profession so as to overcome the challenges and difficulties in the sector.



鳴謝 ACKNOWLEDGEMENT

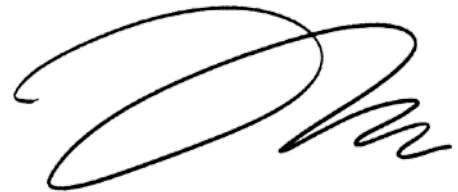
謹代表理事會全仁向本會贊助人和榮譽顧問衷心謝忱，感謝他們對協會的貢獻，慷慨地付出寶貴建議和支持，這些都是推動本會成功發展的重要因素。

本人很榮幸能夠為註冊財務策劃師協會服務，謹此向創會會長施德芝博士、各副會長：范維綱先生、梁廣雄先生和鍾偉雄律師、全體理事、秘書處、各小組委員會及資深會員們表達衷心的謝意，感謝你們對本人在任期間大力支持，全情投入會務。

最後，本人希望各位能繼續支持來屆理事會及日後協會舉辦之活動，並衷心祝願協會穩步發展，進一步推動財務策劃服務水平。

On behalf of the Council of Management, I would like to convey my hearty appreciation to our patrons and advisors, who had made contributions throughout the years. Their precious advices 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, Mr. Calvin Leung and Mr. Gerard Chung, the council members, the secretariat, sub-committees and fellow members for their tireless 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.



會長 黃敏碩先生
Mr. Michael WONG
President
(2016 / 2017)

Room 1404, 14/F, Blissful Building, 243-7 Des Voeux Road Central, Hong Kong.

Tel:(852) 3105 1744

Fax: (852) 2186 7136

E-mail:info@hkrfp.org

Copyright © 2017 Society of Registered Financial Planners. All Rights Reserved.

