



Organizer  
Society of Registered Financial Planners  
Hong Kong Undergraduate Financial Planners of the Year Award 2018  
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(November 21, 2018, Hong Kong) –“Hong Kong Undergraduate Financial Planners of the Year Award 2018” (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 ***"In the Chief Executive's 2018 Policy Address, the Government will continue to forge a conducive environment to enhance Hong Kong's leading position as an international and regional financial center."***

***Among many other policy initiatives, the Chief Executive mentioned two measures to achieve the above objective:***

- 1. The Government will allow the formation of special purpose vehicles in Hong Kong specifically for issuing insurance-linked securities to enrich the risk management tools available in the Hong Kong market.***
- 2. The Government will facilitate the promotion, facilitation, regulation, talents and funding of Fintech products, including the launch of HKMA's Faster Payment System and the developemnt of e-wallets to link up banks and stored value facilities operators.***

***As a seasoned financial planner, how would you capture the momentum in the financial planning industry to benefit both your employer as well as your own career?"*** 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 2018". It's honored for the HKRFP to have invited Mr. Vincent Lee, BBS, MSc FCPA, Deputy, the 13th National People's Congress, PRC and Chairman of Tung Tai Group of Companies to officiate the Hong Kong Undergraduate Financial Planners of the Year Award 2018" Final Round and Award Presentation Ceremony on 17 November, 2018. Upon careful screening and audit of 64 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 2018:

University	Team Name	Members	Prize
The Hang Seng University of Hong Kong	The Beyonders	CHAN Chin Hong, Brooklyn; TSE Kwan Tsz, Jane; NG Shun On, Sean; HO Kai Kong	Champion
The Hong Kong University of Science and Technology	Sailor Moon	XU Chongsheng; LIU Zedek Wai Lam; WONG Lui; LI Mengyi	1st Runner-up
Hong Kong Shue Yan University	League of Legends	LEE Wing Sze; CHEN Huixuan; HE Guantao	2nd Runner-up



City University of Hong Kong	Luminous	WU Ka Chun; CHAN Wing Him; LAM Chin Hei; LAU Wing Man	3rd Runner-up
University	Team Name	Member	Prize
The Hang Seng University of Hong Kong	The Beyonders	CHAN Chin Hong, Brooklyn	Best Presenter Award

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

University	Team Name	Members
City University of Hong Kong	Black Mamba	TSANG Tak Lok, Derek; WANG Xinyu, Mikal; CHEN Yalin, Ruby; CHAN Ki Fung, Keith
Hong Kong Shue Yan University	CURL	WONG Pui Shan; CHAN Ka Yan; LEUNG Maan Chi
City University of Hong Kong	Double XL	XU Menghan; LI Yuexuan; LIAO Honglin; XIE Wenyu
City University of Hong Kong	DPL	DAN Yujing, Pemberley; DAI Tian, Demi; LI Wenda, Frank; DUAN Yixuan, Bianca

(\*In alphabetical order of team name)

The following five 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	Achievement	CHAN Kwok Chuen; WONG Cho Pan; LO Yat Lai; CAO Dongliang
The Hong Kong University of Science and Technology	Financial Ambassador	YEUNG, Chi Man; CHIU, Long Kuan; LAM, Tze Kuan; XIA, xiaotong, Miranda
City University of Hong Kong	Miracle Workers	WONG Cheuk Ho; LAM Ho Hei; CHAN Tsz Ki Jefferson; TSE Hiu Ching
The Hang Seng University of Hong Kong	Pacific	CHEUNG Chung Hang; YAU Chun Yin; LAW Chi Hin; YU Kwok Ho
City University of Hong Kong	Windward	KO Ka Lo, Lucia; CHAN Sum Yee, Suri; LO Nga Ying, Kelly

(\*\*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)	Former President, CUHK-TWGH Community College, Education Consultant
Mr. Michael Fan	Honorary Life President of Hong Kong Society of Economists
Dr. Perry IP	Assistant Professor of CityU of Macau
Miss Daisy Lo	Director 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
Mr. Ian Huang	Chairman of Co-operatives of Innovative Intellectuals
Mr. Michael Wong	President and UFP award 2018 Chairman of Society of Registered Financial Planners

Supporting Organizations / Associations
Smart City Consortium
Co-operatives of Innovative Intellectuals
Hong Kong Securities and Investment Institute
The Hong Kong Institute of Financial Analysts and Professional Commentators Limited
The Actuarial Society of Hong Kong
The Hong Kong Management Association
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

**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, <sup>GBM</sup> KBE JP, and Dr. Edmund Tse, <sup>GBS</sup>.

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



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