



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

2018 會長報告 2018 THE PRESIDENT'S REPORT

2018年9月10日
10 September, 2018



組織架構 管理委員會

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Mr. Gerard Chung
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給會員的話

MESSAGE TO MEMBERS

過去十七個年頭，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 and developments of our Society in Hong Kong and China mainland have been full of surprises and challenges, and proves to be valuable experience in my life in the past seventeen years. 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 the term of my office in the last 12 months.

會長 黃敏碩先生
Mr. Michael WONG
President
(2017 / 2018)

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。是次比賽一共有82隊大學生參加，本會並榮幸地邀請大舜基金及一帶一路國際發展聯盟主席何鍾泰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 7th anniversary competition and the event received yet another unprecedented hurrah from the academic institutions in the region. Dr. Raymond Ho Chung-tai, SBS, MBE, SBStj, JP, chairman of Dashun Foundation and Belt & Road Global Development Alliance 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. We have 82 team of student from universities. 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2017年12月贊助香港專業教育學院(葵涌及柴灣分校)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 (Kwai Chung & Chai Wan), in December 2017, 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2017年獲得了由勞工及福利局社區投資共享基金主辦之“2017社會資本動力獎”。今年本會更獲得香港中小型企業總商會頒發“友商有良2017/2018”。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 2017. Also, We received "Partner Employer Award 2017/2018" form The Hong Kong General Chamber of Small and Medium Business. 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.

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10月30日 30 October, 2017 | Listed Enterprises of the Year 2017 | 彭博商業周刊 Bloomberg Businessweek |
| 2017年12月4日 4 December, 2017 | 領先基金大獎 2017 Top Fund Awards 2017 | 彭博商業周刊 Bloomberg Businessweek |
| 2017年12月19日 19 December, 2017 | FDT 第二屆京港澳金融投資大賽 | FDT金融創新工場 |
| 2018年1月11日 11 January 2018 | 讓愛「全」世界啟動禮暨「香港最受歡迎品牌 2017」品牌巡禮 | 亞洲品牌發展協會 Famous Brands Asia |
| 2018年4月19日 19 April, 2018 | 「香港最受歡迎品牌」2017年度頒獎典禮暨 2018年度公佈典禮 | 亞洲品牌發展協會 Famous Brands Asia |
| 2018年4月26日 26 April, 2018 | Meeting the Professionals 2018 | 香港專業教育學院 Hong Kong Institute of Vocational Education (IVE) |
| 2018年5月30日 30 May, 2018 | 華富卓越投資者關係大獎 QuamIR Awards Ceremony | 中國泛海金融財經媒體有限公司 Oceanwide Financial Media Lim- ited |
| 2018年8月25日 25 August, 2018 | ABNEWS首屆全球區塊鏈技術新金融財經論 壇暨優質項目成果展 | 33財經、鏈上母基金 |
| 2018年8月31日 31 August, 2018 | 社會資本動力獎2018分享會 | 香港生產力促進局 Hong Kong Productivity Council |



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 |
|----------------------------------|--|---|
| 2017年10月30日 30 October, 2017 | Listed Enterprises of the Year 2017 | 彭博商業周刊 Bloomberg Businessweek |
| 2017年11月28日 28 November, 2017 | 銀行及金融服務企業獎2017* | 《都市日報》及《都市盛世》 Metro Daily and Metro Prosperity |
| 2017年12月4日 4 December, 2017 | 領先基金大獎 2017 Top Fund Awards 2017 | 彭博商業周刊 Bloomberg Businessweek |
| 2018年2月8日 8 February, 2018 | 都市卓越品牌大獎2017* Metro Awards for Brand Excellence | 《都市日報》及《都市盛世》 Metro Daily and Metro Prosperity |
| 2018年4月19日 19 April, 2018 | 「香港最受歡迎品牌」2017年度頒獎典禮暨2018年度公佈典禮 | 亞洲品牌發展協會 Famous Brands Asia |
| 2018年9月13日 13 September, 2018 | 都市傑出服務大獎2018* Metro Award for Service Excellence 2018 | 《都市日報》及《都市盛世》 Metro Daily and Metro Prosperity |
| 2018年9月15日 15 September, 2018 | Contemporary Logistics Forum | The Hong Kong Polytechnic University |

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*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.



專業講座

PROFESSIONAL SEMINARS

部分資料只有中文/英文。

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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 |
|----------------------------------|---|---|
| 2017年9月14日 14 September, 2017 | 環球中港股市迎接第四季的投資部署 | 黃敏碩先生 康證有限公司董事 註冊財務策劃師協會會長 Mr. Michael M.S. WONG Director – CSL Securities Limited President of The Society of Registered Financial Planners |
| 2017年10月25日 25 October, 2017 | 綠色豐盛人生，回歸自然活出幸福 | 周兆祥博士 前香港中文大學及香港浸會大學教授 香港資深綠色生活推廣者 綠色組織綠色力量創辦人之一 Dr Simon Chau Siu-cheong Leading veteran green guru and former professor of The Chinese University of Hong Kong |
| 2017年11月15日 15 November, 2017 | 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 |
| 2017年12月15日 15 December, 2017 | 氣與疾病的關係及氣功改善疾病的原理 | 梁寶衡 氣功師傅 註冊財務策劃師協會副會長 元氣自療學會 會長 新城財經電台及DBC電台節目主持人 香港中文大學中醫學碩士 城市大學行政人員工商管理碩士銜 (EMBA) Mr. Derek P.H. LEUNG, EMBA Vice President of HKRFP Master of Chiology, Metroration and DBC host |

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| 時間 Date | 活動 Activities | 主辦 Organizers |
|--------------------------------|---|---|
| 2018年1月19日 19 January, 2018 | 「防止貪污 專業誠信」金融服務界從業員廉政講座 Corruption Prevention and Professional Integrity – ICAC seminar for financial services practitioners | 馬淑兒 女士 高級廉政教育主任 Ms Katherine Ma Senior Community Relations Officer |
| 2017年2月8日 8 February, 2018 | 2018上半年投資分析 | 黃敏碩先生 康證有限公司董事 註冊財務策劃師協會會長 Mr. Michael M.S. WONG Director – CSL Securities Limited President of The Society of Registered Financial Planners |
| 2017年3月14日 14 March, 2018 | 金融科技(Fintech)的發展趨勢,對金融,保險及投資,理財策劃行業的影響及粵港澳大灣區帶來的機遇 | 郭志成先生 亞洲金融科技師學會 創辦人 Mr. Wilson C. Kwok Co-founders of The Institute of Financial Technologists of Asia (IFTA) |
| 2017年4月19日 19 April, 2018 | 金融投資時的快思慢想 | 葉仁傑博士 澳門城市大學助理教授 Dr. Perry IP Assistant Prof. of CityU of Macau |
| 2018年5月31日 31 May, 2018 | 獨角獸的陰暗面 Dark side of Unicorn | 朱維鵬先生 註冊財務策劃師協會副會長 Mr. Chester CHU Vice president of HKRFP |
| 2018年6月21日 21 June, 2018 | Updates on Keeping of Significant Controllers Registers (SCR) and Licensing of Trust or Company Service Providers (TCSP) | 邱賢君先生 邱在光合伙會計師行有限公司首席執業董事 Mr. Joseph Y K Yau Managing Practising Director of C K Yau & Partners CPA Limited |
| 2018年7月26日 26 July, 2018 | 2018下半年投資部署分析 | 黃敏碩先生 康證有限公司董事 註冊財務策劃師協會會長 Mr. Michael M.S. WONG Director – CSL Securities Limited President of The Society of Registered Financial Planners |
| 2018年8月29日 29 August, 2018 | 如何遠離都市人的痛症 | 梁寶衡 氣功師傅 元氣自療學會 會長 新城財經電台及DBC電台節目主持人 香港註冊中醫師 香港中文大學中醫學碩士 城市大學行政人員工商管理碩士銜 (EMBA) 註冊財務策劃師協會副會長 Mr. Derek P.H. LEUNG, EMBA Vice President of HKRFP Master of Chiology, Metroradio and DBC host |



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

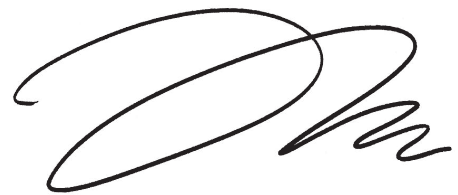
謹代表理事會全仁向本會贊助人和榮譽顧問衷心謝忱，感謝他們對協會的貢獻，慷慨地付出寶貴建議和支持，這些都是推動本會成功發展的重要因素。

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、梁寶衡先生、鍾偉雄律師和朱維鵬先生、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 Derek Leung, Mr. Gerard Chung and Mr. Chester Chu 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
(2017 / 2018)



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