







Prioritization of Needs

After the above analysis, it is likely to generate analysis of available resources to solve identified problems and objectives with the following action.

A cash budget:-

• to monitor regular expenses and to prepare for shortage in any emergency expenses

- To plan and spend properly
- Expenses driven budget
- Income driven budget

•Review on Investment



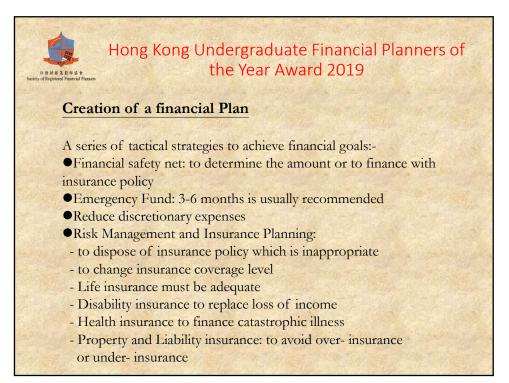




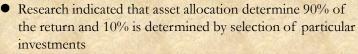












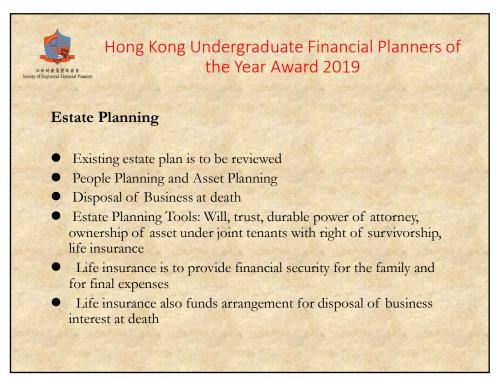














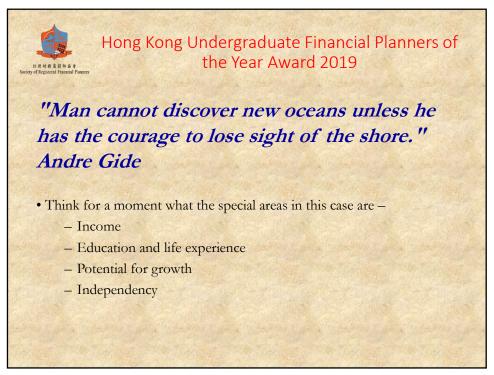


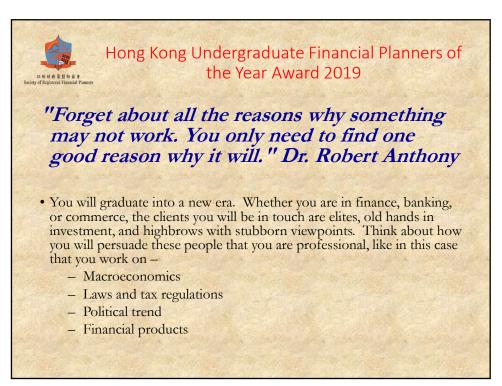


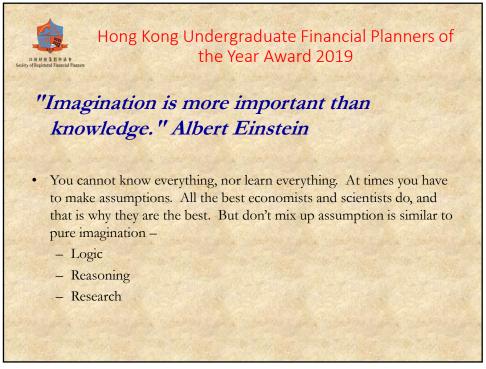


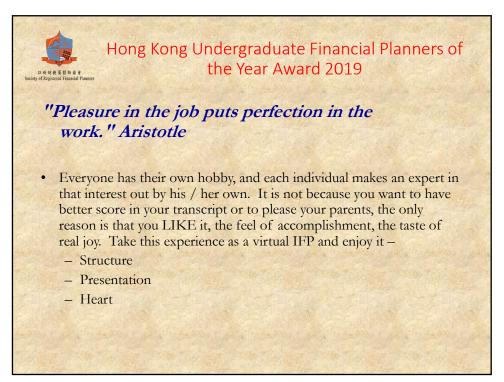






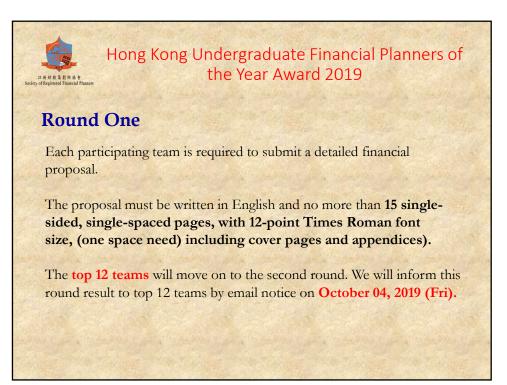








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	Important Dates
August 12 - September 04	Registration period
September 07 (Sat)	Financial Planning Workshop
September 23 Mon) 23:59	Deadline for Round One
October 04 (Fri)	Round One results announced (12 teams)
October 16 (Wed) 17:00	Deadline for Round Two
October 24 (Thur)	Round Two results announced (8 teams)
November 13 (Wed) 18:00	Deadline to submit presentation file for Final Round (4 teams)
November 16 (Sat) AM Final round and Award Presentation Ceremony	





Hong Kong Undergraduate Financial Planners of the Year Award 2019 Round One – Criteria (Maximum: 100 scores)		
Criterion Assessment		
1.Effecitve use of client's information (15 scores)	Make use of all the information provided in the case to assess the current financial conditions of the client.	
2. Formulation of financial goals (10 scores)	Help the client establish realistic financial goals given his/her constraints	
3. Formulation of a comprehensive financial proposal (40 scores)	Devise and defend a comprehensive financial proposal that is most suitable for the client to achieve his/her financial goals.	
4. Risk analysis (15 scores)	Identify risks that may arise in the financial proposal and suggest safeguards to mitigate these risks	
5. Presentation (20 scores)	Clarity, organization, conciseness, grammar.	



Hong Kong Undergraduate Financial Planners of the Year Award 2019 Round Two – Criteria (Maximum: 100 scores)		
Criterion	Assessment	
1. Communication skills (45 scores)	Present ideas clearly, systematically, effectively, and forcefully	
2. Content delivery (35 scores)	Present the most essential elements of the financial proposal within the time constraint provided	
3. PPT (15 scores)	Quality of PPT	
4. Other (5 scores)	Charisma and team spirit	



	ward 2019			
Final Round – Criteria (Maximum: 100 scores)				
Criterion	Score			
Knowledge of the topic	20 scores			
Logical thinking	20 scores			
Presentation skills	20 scores			
Innovations, independent thinking	40 scores			
	100 scores			



