



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

2019 會長報告 2019 THE PRESIDENT'S REPORT

2019年9月30日
30 September 2019



組織架構 管理委員會

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給會員的話 MESSAGE TO MEMBERS

過去十八個年頭，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 eighteen 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
(2018 / 2019)



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，喜見港澳大學生踊躍參加，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84隊大學生參加，本會並榮幸地邀請東泰集團主席李君豪先生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2018」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 into its 8th anniversary competition and the event received yet another unprecedented hurrah from the academic institutions in the region. Mr. Vincent M Lee , BBS, Msc, FCPA, chairman of Tung Tai Group of Companies was invited as the Guest of Honor to the award ceremony to share his experience in career development and visions in education in the financial planning industry. We have 84 teams 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 thank you 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 eighth year and was in its implementation from August 2018 to November 2018. 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

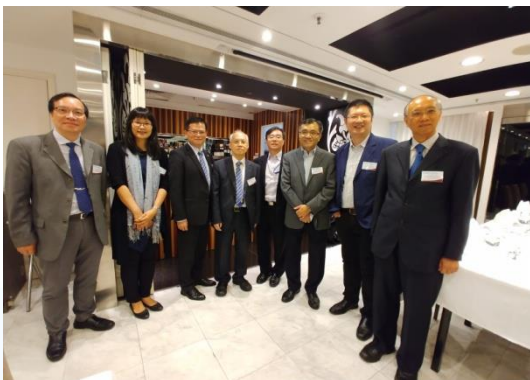
為鼓勵成績優異的學生，本會於2018年12月贊助香港專業教育學院(柴灣分校)之「註冊財務策劃師獎學金」。

We granted the “HKRFP Scholarship” to outstanding students of the Hong Kong Institute of Vocational Education (Chai Wan), in December 2018, 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2018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2018/2019”。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 2018. Also, We received "Partner Employer Award 2018/2019" from 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 organizations 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.

日期 Date	活動 Activities	主辦 Organizers
2018年10月5日 5 October 2018	2018 LSCM物流高峰會議「貢獻大灣區創新科技實踐多元化一帶一路」	物流及供應鏈多元技術研發中心
2018年10月29日 29 October 2018	AMTD Innovation Lab Tour	eventbrit
2018年10月30日 30 October 2019	2018 CUHK Conference on Financial Technology: When Wall Street Met Main Street – The Human & AI Brainwave Resonance.	The Chinese University of Hong Kong
2018年11月22日 22 November 2018	Social Enterprise Summit 2018	Social Enterprise Summit
2018年11月22日 22 November 2018	2018大中華獨立董事論壇 – 探索新經濟企業的關鍵元素	
2018年12月4日 4 December 2018	Mentoring Programme Graduation and Welcome Cocktails	Hong Kong Securities and Investment Institute 香港證券及投資學會



日期 Date	活動 Activities	主辦 Organizers
2018 年12月13日 13 December 2018	「大灣區最具潛力大獎」嘉許典禮	《都市日報》及《都市盛世》
2019年1月24日 24 January 2019	Quamnet Outstanding Enterprise Awards 2018	中國泛海金融財經媒體有限公司 Oceanwide Financial Media Limited
2019年3月1日 1 March 2019	AI & Big Data Innovation Forum 2019	Hong Kong Applied Science and Technology Research Institute (ASTRI)
2019年4月4日 4 April 2019	Naming Ceremony of the Lee Shau Kee Complex – HSUHK	Hang Seng University of Hong Kong
2019年4月12日 12 April 2019	HKSI Institute – Chairman’s Cocktails 2019	HKSI Institute
2019年4月15日 15 April 2019	The 3rd Business Journalism Awards of HSUHK Presentation Ceremony	The Hang Seng University of Hong Kong
2019年4月26日 26 April 2019	第五屆中國董秘峰會暨科創板上市戰略論壇	華揚資本、資鯨
2019年5月23日 23 May 2019	HSUHK Honorary Fellowship Conferment Ceremony 2019	Hang Seng University of Hong Kong





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 councilors had also acted as judges in many of these activities to promote business management.

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日期 Date	活動 Activities	主辦 Organizers
2018年10月11日 11 October 2018	香港最受歡迎品牌2018	亞洲品牌發展協會
2018年11月29日 29 November 2018	銀行及金融服務企業獎2018	《都市日報》及《都市盛世》
2018年12月1日 1 December 2018	Student Awards Presentation Ceremony 2018	Hang Seng Management College
2018年12月18日 18 December 2018	社會資本動力獎頒獎禮2018	社區投資共享基金
2019年1月17日 17 January 2019	香港最受歡迎品牌2018	MEEEEPMORE
2019年2月28日 28 February 2019	2019 Spring Dinner of The Society of Chinese Accountants & Auditors ("SCAA")	The Society of Chinese Accountants & Auditors
2019年3月4日 4 March 2019	都市卓越品牌大獎 2018	《都市日報》及《都市盛世》



日期 Date	活動 Activities	主辦 Organizers
2019年4月4日 4 April 2019	Naming Ceremony of the Lee Shau Kee Complex – HSUHK	Hang Seng University of Hong Kong
2019年4月16日 16 April 2019	HKFI 2019 Annual Reception	The Hong Kong Federation of Insurers
2019年4月23日 23 April 2019	Future of Finance Conference 2019	AICPA
2019年5月8日 8 May 2019	全城品牌啟動禮 2019	《都市日報》及《都市盛世》
2019年5月23日 23 May 2019	HSUHK Honorary Fellowship Conferment Ceremony 2019	Hang Seng University of Hong Kong
2019年6月5日 5 June 2019	FTAHK 2nd Anniversary Party	
2019年9月11日 11 September 2019	Dashun – Belt and Road ASEAN Night 2019	Dashun Foundation





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 Activitie	演講者 Speaker
2018年9月18日 18 September 2018	New Economy Companies and Disruptive Technologies	王志榮 博士 首席合夥人 - 亞洲大數據精英諮詢 & 環球華人精英諮詢有限公司 獨立非執行董事 及 內審委員會主席 - 快易通有限公司 Dr. Lawrence C.W. WONG Managing Partner of Big Date Elite Asia Limited
2018年10月25日 25 October 2018	項目評估法	葉仁傑博士 澳門城市大學助理教授 Dr. Perry IP Assistant Prof. of City U of Macau
2018年11月22日 22 November 2018	Essential Asset Management Update: HK Regulatory Developments	Mr. Hugo Ngaw 柯曉宇律師 Group Legal Counsel of Convoy Financial Group



時間 Date	活動 Activitie	演講者 Speaker
2018年12月11日 11 December 2018	視大灣區的資產投資機遇	曹景昌 先生 Mr. King Cho 廣州外商投資企業商會副會長
2019年1月10日 10 January 2019	「樂活人生」平安紙講座	葉鳳仙 律師 Ms. Frances IP 樂活之友協會主席
2019年2月20日 20 February 2019	豬年環球市場投資部署焦點	Mr. Michael M.S. WONG President of The Society of Registered Financial Planners 黃敏碩先生 註冊財務策劃師協會會長
2019年3月20日 20 March 2019	中美貿易摩擦：重塑香港企業 與金融市場發展新的策略思維	Dr. Joe Leung 梁永忠博士 Principal Consultant-Growth Strategy
2019年4月25日 25 April 2019	重塑世界趨勢 Trends that reshape the World	Mr. Chester CHU 朱維鵬先生 Vice President of Society of registered Financial Planners President of The Hong Kong Association of Financial Advisors
2019年5月28日 28 May 2019	輕省你的個人所得稅	Mr. Patrick HO 何健偉先生 Vice President of The Hong Kong Association of Financial Advisors
2019年6月26日 26 June 2019	Location matters in ETF selection 以成本考量選擇ETF交易地點	Mr. Joe Yip 葉子健先生 Assistant Vice President, Exchange Traded Products (ETPs) Development Hong Kong Exchanges and Clearing Limited (HKEX)
2019年7月30日 30 July 2019	FinTech Trends in 2019 金融科技去向 2019	Mr. Raymond Chan 陳穎峰先生 Honorary Guest Lecturer, Executive Development Centre, The Hang Seng University of Hong Kong. Managing Director, a leading FinTech Company in China.
2019年9月16日 16 September 2019	2019 下半年投資部署分析	Mr. Michael M.S. WONG President of The Society of Registered Financial Planners 黃敏碩先生 註冊財務策劃師協會會長





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
(2018 / 2019)



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