



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

## 2020 會長報告 2020 THE PRESIDENT'S REPORT

2020年9月28日  
28 September 2020



## 組織架構 管理委員會

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## Organization Structure Management Council

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Dr. Sidney Sze

President  
Mr. Michael Wong

Vice Presidents  
Mr. Michael Fan  
Mr. Derek Leung  
Mr. Gerard Chung  
Mr. Chester Chu

Honorary Secretary  
Mr. Simon Ho

Honorary Treasurer  
Mr. Stephen Ho

Councilors  
Mr. Peter Fok

## 給會員的話 MESSAGE TO MEMBERS

過去十九個年頭，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。

此外今年經濟及市場大氣候，充滿波動及不明朗，本會會繼續堅守崗位，為會員發聲及爭取業界支持。

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 nineteen 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.

In the current economic climate, with so much volatility and uncertainty, HKRFP should act as a cohesive voice representing the interests of the wealth management at large.

會長 黃敏碩先生  
**Mr. Michael WONG**  
President  
(2019 / 2020)



## 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88隊大學生參加。本會並榮幸地邀請梁定邦博士，QC，SC，JP 蒞臨頒獎典禮並擔任主禮嘉賓。

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。但鑑於先後受社會事件與新冠肺炎疫情影響，本會2019年度「香港傑出大學生財務策劃師比賽」頒獎典禮順延舉行。

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 9th anniversary competition and the event received yet another unprecedented hurrah from the academic institutions in the region. Dr. Anthony Francis Neoh, QC, SC, JP (Queen's Counsel, Senior Counsel, Justice of the Peace) was invited as the Guest of Honor to the award ceremony.

We have 88 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 2019 to November 2019 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.

On account of the impact from the social activities and the outbreak of Coronavirus disease (COVID-19), our society's award ceremony of the competition is postponed.

## 獎學金 SCHOLARSHIP

為鼓勵成績優異的學生，本會於2020年4月贊助香港專業教育學院(沙田分校)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 (Shatin), in April 2020, 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 2019/2020”。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 2019/20" 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.

日期 Date	活動 Activities	主辦 Organizers
2019年9月16日 16 September 2019	SME One Fund Fair Opening Ceremony	Hong Kong Productivity Council
2019年9月17日 17 September 2019	Directors' Symposium 2019 – Embracing Innovation for Sustainable Growth	The Hong Kong Institute of Directors
2019年9月20日 20 September 2019	LSCM Logistics Summit 2019	Logistics and Supply Chain MultiTech R&D Centre
2019年9月21日 21 September 2019	Youth Innovation Inclusion	Healthy Budgeting Family Debt Counselling Centre – Tung Wah Group of Hospitals
2019年9月23日 21 September 2019	CMA 85th Anniversary Cocktail Reception	The Chinese Manufacturer's Association of Hong Kong
2019年10月25日 25 October 2019	2019 「友商有良」嘉許計劃嘉許典禮	The Hong Kong General Chamber of Small and Medium Business
2019年11月4日 4 November 2019	2019 CUHK Conference on Financial Technology	The Chinese University of Hong Kong



日期 Date	活動 Activities	主辦 Organizers
2019年11月4 – 8日 4-8 November 2019	2019 Hong Kong Fintech Week	Finnovasia
2019年11月 5日 5 November 2019	Deloitte Cyber Intelligence Centre – Opening	Deloitte
2019年12月05日 5 December 2019	OUHK 30th Anniversary Banquet	The Open 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.



## 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
2019年10月30日 30 October 2019	解讀金融科技及財富管理發展策略分析	陳家豪先生 Mr. Emil Chan 雲端與流動運算專業人士協會會長
2020年01月07日 7 January 2020	大灣區精準投資智慧	曹景昌先生 盈達昌控股有限公司主席 Mr. King Cho Chairman of Treasure Town Holdings Limited
2019年2月20日 20 February 2019	2020 金鼠年投資部署分析焦點	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





時間 Date	活動 Activitie	演講者 Speaker
2020年03月20日 20 March 2020	21世紀的香港社會 - 破窗理論與路西法效應視大灣區的資產投資機遇	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
2020年5月16日 16 May 2020	儒釋道在香港目前困境的營商/風險之管理及應用	徐惠祥博士 會計師、華人內部審計師公會會長
2020年5月21日 21May 2020	Green Finance	葉榮鏗先生 (Mr. Angus Yip), 余遠騁博士 (Dr. William Yu)
2020年5月21日 21May 2020	和陳啟宗先生對話！中美關係、香港的未來！	陳啟宗先生 恒隆集團有限公司及其附屬公司恒隆地產有限公司之董事長
2020年6月1日 1 June 2020	獨角獸的陰暗面 Dark Side of Unicorn (II) 之重塑世界的趨勢 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
2020年6月23日 23 June 2020	在疫情和社會動盪之時股市、樓市依然節節上升。	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
2020年6月30日 30 June 2020	香港自僱人士的稅務規劃！	Mr. Henry KWONG 鄭發炫先生 漢能稅務有限公司合夥人
2020年7月13日 13 July 2020	2020 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

謹代表理事會仝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。

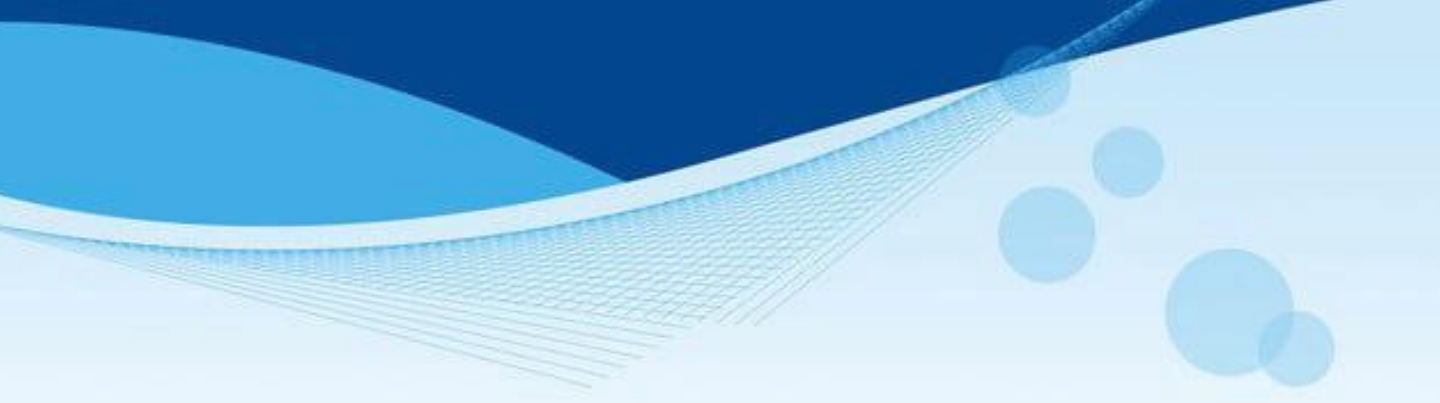
最後，本人希望各位能繼續支持來屆理事會及日後協會舉辦之活動，並衷心祝願協會穩步發展，進一步推動財務策劃服務水平。

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  
(2019/2020)



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