



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

2021 會長報告 2021 THE PRESIDENT'S REPORT

2021 年 9 月 27 日
27 September 2021



組織架構 管理委員會

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給會員的話

MESSAGE TO MEMBERS

過去二十個年頭，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，已逐步轉好和見底回升，本會繼續堅守崗位，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 twenty 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.

The economic climate and market sentiments seems to be bottom out and improve in this years, 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
(2020 / 2021)



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。

但鑑於先後受社會事件與新冠肺炎疫情影響，本會2019年度之「香港傑出大學生財務策劃師比賽」頒獎典禮順延於2021年9月舉行。

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2021」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.

This year, our society walked into its 10th anniversary competition and the event received yet another unprecedented hurrah from the academic institutions in the region. In view the 2019 Award Ceremony of the Hong Kong Outstanding University Student Financial Planners Competition was held in September 2021.

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.



獎學金 SCHOLARSHIP

為鼓勵成績優異的學生，本會於2021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 2021, 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15+”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會頒發“友商有良 2020/2021”。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 Fifteen 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 2020/21" 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
2020年02月20日 20 February 2020	HKSI Institute's Chairman's Cocktails 2020	Hong Kong Securities and Investment Institute
2020年-09月23日 23 September 2020	2020 「友商有良」嘉許計劃嘉許典禮	The Hong Kong General Chamber of Small and Medium Business
2020年10月31日 31 October 2020	「校長X總編論壇：疫情後對資本主義和企業責任的反思」	The Hang Seng University of Hong Kong Securities and Yazhou ZhouKan
2021年04月22日 22 April 2021	Famous Brands Hong Kong香港著名品牌 2020	Famous Brands Hong Kong
2021年05月28日 28 May 2021	Professional Mentorship Programme 2021	IVE (Chai Wan)
2021年07月29日 28 July 2021	「Famous Brands Hong Kong香港著名品牌」2021年度啟動禮	Famous Brands 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 Activities	演講者 Speaker
2020年08月24日 24 August 2020	21世紀的隱形冠軍	Mr. Chester CHU 朱維鵬先生 Vice President of HKRFP President of The Hong Kong Association of Financial Advisors
2020年09月24日 24 September 2020	Latest Developments in Virtual Banks	Mr. Raymond CHAN, CFT, FHKRFP 陳穎峯先生
2020年10月22日 22 October 2020	中港美股及黃金市場分析及ETF投資策略	Miss Lee Yat Lam Barbara 李溢琳小姐 南方東英資產管理ETF及指數策略部 擔任ETF策略師
2020年11月19日 19 November 2020	有關證監會打擊洗錢及恐怖分子資金籌集的監管規定的最新資料	副總監鮑美莉女士 經理徐奕鵬先生
2020年11月25日 25 November 2020	Does Green Finance, ESG and Climate Change Matter to Investment Manager from Regulators' Perspective?	Mr. Dennis Wu Vice Chairman and Executive Director of AEC Group



時間 Date	活動 Activities	演講者 Speaker
2020年12月08日 08 December 2020	施政報告的商機網上論壇之金融商機及前景	1. 朱維鵬先生 2. 黃敏碩先生 3. 梁永忠博士 4. 張新彬先生
2020年12月23日 23 December 2020	How to Walk Away from “Green Wash”?	Mr. Dennis Wu Vice Chairman & Executive Director of AEC Group
2020年12月30日 30 December 2020	1. 有關客戶盡職審查的監管規定和注意事項 2. 透過遙距程序與個人客戶建立業務關係	副總監鮑美莉女士 高級經理范桂鴻先生
2021年01月20日 20 January 2021	看“社會”在ESG的改變影響投資決定 How “Social” of ESG Change influence Investment Decision	Mr. Chester CHU 朱維鵬先生 Vice President of HKRFP President of The Hong Kong Association of Financial Advisor
2021年01月27日 27 January 2021	Connecting Investors and Investment Manager through Sustainable Development Goals (“SDGs”) and Climate Change Risk Disclosures.	Mr. Dennis Wu Vice Chairman and Executive Director of AEC Group
2021年02月24日 24 February 2021	新冠疫苗露曙光 - 繼續擁抱新經濟vs重投舊 經濟懷抱？	Mr. Stephen Chung Global X ETF 銷售副總裁
2021年03月19日 19 March 2021	內地企業如何利用香港融資、壯大、發展海外 和增強競爭能力	1. 朱維鵬先生 2. 張新彬先生 3. 梁浩銘先生 4. 胡伯傑先生
2021年04月15日 15 April 2021	香港多元化的核心價值	Mr. Chester CHU 朱維鵬先生 Vice President of HKRFP President of The Hong Kong Association of Financial Advisor
2021年05月27日 27 May 2021	D&O and Cyber Insurance	Miss Melody Qian 錢一心小姐 Senior Vice President, Global Professional and Financial Risks – Greater China of Lockton Companies (Hong Kong) Limited





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。

本人很榮幸年內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、鍾偉雄太平紳士和朱維鵬先生、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。

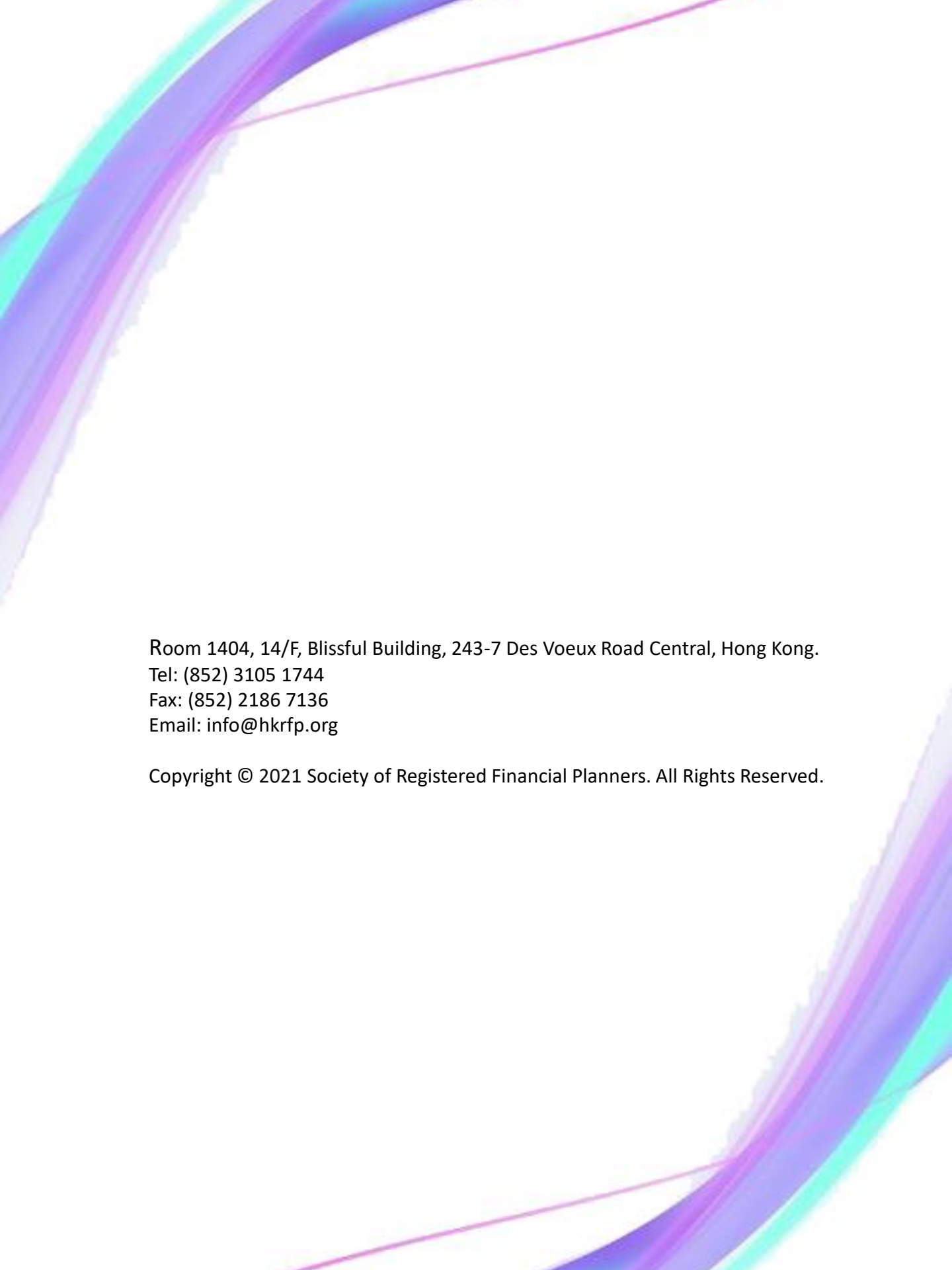
最後，本人希望各位能繼續支持來屆理事會及日後協會舉辦之活動，並衷心祝願協會穩步發展，進一步推動財務策劃服務水平，由本地延至大灣區。

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, J.P. 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 from Hong Kong to Greater Bay Area.



會長 黃敏碩先生
Mr. Michael WONG
President
(2020/2021)



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