



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

2022 會長報告 2022 THE PRESIDENT'S REPORT

2022 年 9 月 29 日
29 September 2022



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給會員的話 MESSAGE TO MEMBERS

過去二十一個年頭，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 one 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
(2021 / 2022)



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66隊大學生參加，本會並榮幸地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2022」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 11th 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 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 66 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 2022 to November 2022. 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2022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 2022, 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商會頒發“友商有良 2021/2022”。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 2021/22" 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
2021年10月16日 16 October 2021	東華三院「燃點·夢想」- 青年創業計劃開幕禮	Tung Wah Group of Hospitals
2021年10月26日 26 October 2021	2021「友商有良」嘉許計劃嘉許典禮	The Hong Kong General Chamber of Small and Medium Business
2021年10月28日 28 October 2021	「Famous Brands Hong Kong香港著名品牌」 2021年度讓愛全世界啟動禮	Famous Brands Hong Kong
2021年11月01日 01 November 2021	Fintech Week 2021	Finnovasia
2021年12月04日 04 December 2021	CUHK MBA Open Day & Sample Class	CUHK Business School – MBA Programmes
2021年12月10日 10 December 2021	GBACNA Inauguration Ceremony	Greater Bay Area Carbon Neutrality Association
2022年06月02日 01 June 2022	「Famous Brands Hong Kong香港著名品牌」 2021年度頒獎典禮	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.





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

專業講座 PROFESSIONAL SEMINARS

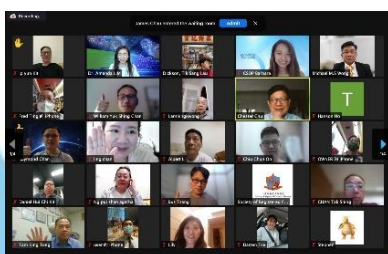
過去十二個月，本會順利地舉辦每月講座，多元化的講題以與財務策劃工作相關為主，講座喜獲多間專業機構擔任支持機構，當中包括香港會計人員總會、香港經濟師學會、商業風險評估專業協會、專業認證學院及香港財務顧問協會。講者的專業知識和出色的互動溝通技巧令會員獲益良多，反應熱烈。我們相信具前瞻性的講座能持續且成功地建立互動平台，讓專業講者與從事財務策劃行業的會員能互動交流。

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
2021年06月17日 17 June 2021	晶片需求大時代 - 台股在全球經濟的槓桿	吳方俊先生 Mr. Alan Ng 富邦基金管理(香港)董事總監
2021年07月08日 08 July 2021	Dos and Don'ts in describing your goods or services – understanding the unfair trade practices legislation	Dr. Albert Ho, CMSM
2021年08月12日 12 August 2021	2021 下半年投資部署分析	Mr. Michael Wong 黃敏碩先生 President of HKRFP Ms 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
2021年09月30日 20 September 2021	果樹投資法	Mr. Chester CHU 朱維鵬先生 Vice President of HKRFP President of The Hong Kong Association of Financial Advisor
2021年11月30日 30 November 2021	投資新方向 - 另類資產管理及私募投資	Mr. Nick Wong 王浩然先生 Altive 安投管理合夥人



時間 Date	活動 Activities	演講者 Speaker
2021年12月07日 07 December 2021	Latest ESG and Climate Change Trends and Opportunities in Finance Industry	Mr. Dennis Wu Vice Chairman and Executive Director of AEC Group
2022年01月06日 06 January 2022	「智」能投資：2022市場展望	Mr. Michael Wong 黃敏碩先生 註冊財務策劃師協會會長 Mr. Ricky Xie 謝陽先生 AQUMON 算法策略部 Miss. Ria Tan 譚若涵小姐 AQUMON 財富管理部
2022年02月10日 10 February 2022	Increase Profit via Effective Cost	Mr. Richard C H Wong President of Cost Reduction Consulting Services
2022年03月17日 17 March 2022	『SPAC』 Opportunities – Part II	Mr. Chester CHU 朱維鵬先生 Vice President of HKRFP President of The Hong Kong Association of Financial Advisor
2022年04月14日 14 April 2022	元宇宙投資多面睇	Dr. Lim Amanda 林屏博士 Director of ACH Worldwide Limited 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
2022年05月17日 17 May 2022	透過NFT應用於演算自動交易及資產管理	Mr. Rex Tsang 曾啟邦先生 演算交易協會聯合創辦人兼主席
2022年06月14日 14 June 2022	律師和會計師如何處理公司股份交易?	Mr. Paul Lam 林培森律師 柯伍陳律師事務所(ONC Lawyers)
2022年07月06日 06 July 2022	利用逆按揭靈活製造您的被動收入	Dr. Denise Cheung 張佩儀博士 中國通海私人財富管理有限公司之董事總經理
2022年07月19日 19 July 2022	放眼 2022下半年財富管理新趨勢	Mr. Darryls Sing 成學翔先生 中銀集團人壽，學習及發展主管 Miss Fion Leung 梁灝明小姐 中國銀行(香港)有限公司業務經理拓展經理





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

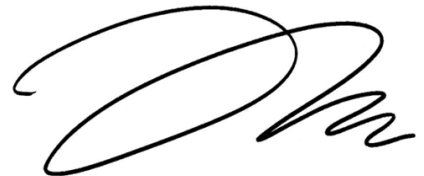
謹代表理事會仝仁向本會贊助人和榮譽顧問衷心謝忱，感謝他們對協會的貢獻，慷慨地付出寶貴建議和支持，這些都是推動本會成功發展的重要因素。

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
(2021/2022)



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