



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

同心展關懷
caringorganisation
Awarded by The Hong Kong Council of Social Service
香港社會服務聯會頒發

The President's Report

(For the year ended August 31, 2010)

Organization Structure

Management Council

President : Dr. Sidney Sze

Vice Presidents : Mr. Michael Fan, Mr. Derek Leung, Mr. Alex Lung

Honorary Secretary : Mr. Simon Ho

Honorary Treasurer : Mr. Stephen Ho

Councilors : Mr. Gerard Chung, Mr. Peter Fok, Mr. William Fung,

Mr. Calvin Leung, Mr. Michael Wong, Dr. Clement Wong

The President's Report is, in my opinion, meant to give a summary of what has been accomplished, what is brewing, and how progresses are with respect to operations of the Society during my term of office. And hereby I am delighted to state that report to you all. Prior to proceeding on, I move forward, on behalf of the Society, to express deep mourning for the loss of our Patron, Dr. The Hon Leo Tung-hai Lee, GBM, OBE, JP, a Standing Committee Member of the Chinese People's Political Consultative Conference (formerly), Chairman of Tung Tai Group of Companies, on June 8, 2010.

Society Development in Hong Kong

Volatile economic environment around the world, as I had mentioned quite frequently in the past, is dangerous, financial planning practitioners not only should have a keen market sense, hold onto their professional

customer-priority spirit, but must also own the quality of a "generalist" to meet the needs of customer in financial planning. On this end, we have actively invited professional speakers to talk on a variety of diversified topics at academic seminars, which in general is warmly supported by a number of professional organizations, namely, the Hong Kong Accounting Professionals Association, the Institute of Financial Accountants in Hong Kong, the Certified Management Accountants of Canada Hong Kong Branch, the IT Accountants Association, the Institute of Crisis and Risk Management, and the University of Macau (Hong Kong) Alumni Association. These talks are visionary and provide an interactive platform among speakers and the audience, composed of practitioners in the financial planning profession. So far, our members have been responding enthusiastically towards the seminars, detail as follows:

Date	Topic	Speaker
19 November 2009	Make Smart Decisions with Right-on-Time Information: Build Intelligent, Interactive & Simple-to-understand Reports	Mr. Tang Kok Kwai
13 November 2009	A Reflection of life after Financial Tsunami	Dr. Cheng Hing Wan
20 November 2009	Etiquette Rules the World (Approaching Clients and Prospects in Proper Style)	Dr Agatha Shuk-Yee Wong-Fraser
18 December 2009	Investment Outlook	Mr. Michael WONG
29 January 2010	Happy Hour Gathering Financial Tsunami:	/
2 February 2010	Lessons, Challenges and Opportunities for the financial industry	The Hon Paul CHAN, MH, JP
26 February 2010	“後金融海嘯後”：發財之「軟」力量 錢從那裏來？ 客往何處去？”	Dr. Joe LEUNG
16 March 2010	Annual Symposium of Risk Management (By KORNERSTONE)	/
26 March 2010	“新概念與新機遇”	Mr. Wallace TSANG Mr. James WONG
16 April 2010	Career Development – Business Skills DNA® Using Football Premier League to Illustrate Your Power	Dr Agatha Shuk-Yee Wong-Fraser
30 April 2010	The use of Private Trust in Wealth Management	Mr. Jimmy Pun
7 May 2010	The Origins of Economics – as a social biological issue	Mr. Lee Po Nang
14 May 2010	Career Development – Business Skills DNA® How to Develop a Millionaire Mentality: Managing Your Career Threats & Skills Transfer	Dr Agatha Shuk-Yee Wong-Fraser
10 June 2010	2010 Investment Outlook (Half Year)	Mr. Michael WONG
25 June 2010	處於危機中投資的新方向	Mr. Keynes TIN Mr. James WONG
7 July 2010	Horse Racing Night cum Dinner Buffet 「踏上人生舞台 做個真自我」	/
19 August 2010	(By American International Assurance Company (Bermuda) Limited)	Mr. Alfred CHEUNG
20 August 2010	If they can, you can	Dr. Joe LEUNG



Society Development in the Mainland China

China's rapid economic development leads to massive demand for financial planning services. Our Society has been in Beijing, Shanghai, Hangzhou, Zhejiang, Guangxi, Guangzhou, Shenzhen, Zhuhai, Zhongshan and some other provinces, forming cooperation with universities, and has made trainings for over 2,000 professional financial planners. Unfortunately in last year, 廣州市華工旭科技有限公司 acted out a breach on agreement, and the Society is still going through legal proceedings on the case. Chen Weiguang, former Chief Representative of the HKRFP Guangzhou Representative Office, refused to return our official stamps and unilaterally and unlawfully conducted changes in procedures. There were found counterfeit copies for many people in the field of financial planning, and we have made declaration to many, inclusive the IARFP (International Association of Registered Financial Planners) that such act has no connection whatsoever with our Society. Yet to a certain extent, the Society's credibility and local development in the PRC market does take a hit, so in the coming year we shall handle the mainland development very carefully. The aftermath will be to re-link with domestic education operators, and later on extend to general professional training sectors in China.

Community Contribution

The Society is committed to promote community education on financial planning. Our participation at the Healthy Budgeting Family Debt Counseling Centre 『財智 Goal 飛』教師社區協作計劃之『第一屆全港理財教育辯論比賽』 of the Tung Wah Group of Hospitals was operated by our council members, Dr. Clement WONG, Mr. Stephen HO and Mr. Calvin LEUNG, as judges for a debate competition, which

passes on positive financial attitude to secondary school students.

Another function of the Society has engaged in was a campaign about financial planning education. Organized by the Tung Wah Group of Hospitals Healthy Budgeting Family Debt Counselling Centre, our Vice President Mr. Michael FAN were invited to conduct seminars among community for the elderly and teacher training for Secondary School. On December 17, 2009 『The Smart Money』 elderly FQ training scheme, "The Smart Retirement" FQ financial management seminars for the elderly were held and over a hundred senior citizens fostered positive feedbacks and valued high of the financial planning sections. On February 22, 2010, Teacher Training Program for Secondary School was held successfully. Upon completion of the financial planning training for teachers last year, we followed up this year on November 27, 2009 with 校本理財教育系列之『中學生財商・通識探究』 teacher training. Again, the responses have been overwhelmingly positive.

In addition, the Society, as one of the supporting organizations for Disabled wheelchair charity, held a dance party on November 6, 2009 with organizers of the Institute of Financial Accountants Hong Kong and Hong Kong Phab Association. The theme was about the social needs of different sectors and serving community works.

We also supported the Social Enterprise Summit on 13-15 November 2009, the "International Symposium - Development

Strategies, Partnerships and Investment Opportunities" to promote social enterprises, civilian society and corporate citizenship.

We should appreciate that this is the fourth consecutive year that the Society is awarded the "Caring Organisation" by the Hong Kong Council of Social Service, logo in recognition of this is on our public materials, that we care, with caring staff, and caring environment excellence.

Professional Support for Industry

This activity actively supports and promotes professional financial planning and related developments. Council members serve as the assessors on behalf of the members and the function is supported by the Hong Kong Institute of Vocational Education (Chai Wan) and organized by the Department of Business Administration. Functions include the "Hong Kong Senior Secondary School Students e-Card Design Competition 2010 – Marketing Green Ages", the "PRIME Awards for the Best Brand Enterprise in Greater China 2010" of Prime Communication Limited, "the AIA Outstanding Financial Planning Awards for Hong Kong Undergraduates 2010" by the American International Assurance Company (Bermuda) Limited.

The functions attracted invitation from organizers of large-scale activity - "The

Asian Financial Forum" organized by the HKSAR Government and the Hong Kong Trade Development Council, our members participated and learned about the latest market trend in financial planning.

Leadership

The principal role of the President is to provide leadership and direction for the HKRFP through chairing the Society and acts as the representative for the Society in fighting for rights and benefits for its members. In this capacity, I have quite often made public appearances and spoken for the Society and our members. I also formulate missions and look for advancement in excellence for our members in the financial planning profession.

Memberships

As of August 2010, total membership registered are 3,030.

Closing Remarks

Finally, I do enjoy my term of serving the Society. I would like to express my sincere gratitude to our Vice Presidents - Alex, Derek and Michael, all council members, the secretariat, sub-committees and fellow members for their full support and great assistance in due course. I do hope that all of you will continue to support the upcoming new board and activities launched by the HKRFP.



Dr. Sidney SZE
President (2009/10)



注册财务策划师协会

Society of Registered Financial Planners



会长报告 (截至 2010 年 8 月 31 日)

組織架構

管理委員會

會長：施德芝博士

副會長：范維綱先生、梁寶衡先生、龍松榮先生

名譽秘書：何志成先生

名譽司庫：何焯新先生

理事：鍾偉雄先生、霍錦就先生、馮威廉先生、
梁廣雄先生、黃敏碩先生、黃毓平博士

作为注册财务策划师协会会长，我欣然向大家扼要汇报在本人任内协会各项工作的进展及成果前，谨代表本会向前全国政协常委、香港东泰集团公司主席、本会赞助人李东海博士大紫荆勳贤太平绅士于2010年6月8日不幸因病与世长辞，本会深感悲痛，并致以深切悼念。

协会于香港的发展

全球经济环境变化不定，正如本人曾多次提及财务策划从业员不只具备敏锐市场触觉，持有以客为先的专业精神，更

须具备「通才」，满足客户不同的财务策划要求；为此，本会积极邀请多位专业讲者主持多元化学术讲座，更获多间专业机构担任支持机构，如香港会计人员总会、英国注册财务会计师公会香港分会、加拿大英属哥伦比亚省公认管理会计师公会、资讯财务师协会、商业风险评估专业协会及澳门大学(香港)校友会，让会员自我增值，并与讲者互动交流，提高财务策划从业员的专业水平，会员均踊跃参与，反应热烈。详情如下：

日期	讲题	讲者
2009年11月19日	Make Smart Decisions with Right-on-Time Information: Build Intelligent, Interactive & Simple-to-understand Reports	Mr. Tang Kok Kwai
2009年11月13日	金融海啸对生命的反思	郑庆云博士
2009年11月20日	Etiquette Rules the World (Approaching Clients and Prospects in Proper Style) 礼仪控天下	黄淑仪博士
2009年12月18日	Investment Outlook	黄敏硕先生
2010年1月29日	Happy Hour Gathering	/
2010年2月2日	Financial Tsunami: Lessons, Challenges and Opportunities for the financial industry	陈茂波议员 MH, JP

2010年2月26日	“后金融海啸后”：发财之「软」力量 钱从哪里来？客往何处去？”	梁永忠博士
2010年3月16日	Annual Symposium of Risk Management 由 KORNERSTONE 主办	/
2010年3月26日	“新概念与新机遇”	曾德明先生 及 黄浚先生
2010年4月16日	Career Development – Business Skills DNA® Using Football Premier League to Illustrate Your Power	黄淑仪博士
2010年4月30日	The use of Private Trust in Wealth Management	潘国荣先生
2010年5月7日	从社会生物学角度看经济学起源	李宝能道长
2010年5月14日	Career Development – Business Skills DNA®How to Develop a Millionaire Mentality: Managing Your Career Threats & Skills Transfer	黄淑仪博士
2010年6月10日	2010 Investment Outlook (Half Year)	黄敏硕先生
2010年6月25日	处于危机中投资的新方向	田建业先生 及 黄浚先生
2010年7月7日	Horse Racing Night cum Dinner Buffet 「踏上人生舞台 做个真自我」	/
2010年8月19日	(由美国友邦保险(百慕达)有限公司主办	张坚庭导演
2010年8月20日	If they can, you can	梁永忠博士

协会于内地的发展

中国经济发展迅速，公众对财务策划服务需求殷切，本会曾于北京、上海、杭州、浙江、广西、广州、深圳、珠海、中山等省区，与大学团体合共培训逾2,000名专业财务策划师。然而过去一年，广州市华工旭科技有限公司违反合作协议一案，协会现仍与其进行法律程序、香港注册财务策划师协会广州代表处前首席代表陈伟光拒绝交还公章而无法办理延期、更改等手续，而坊间抄袭假冒为财务策划会者众，本会现声明与国际财务策划师公会 IARFP(International Association of Registered Financial Planners)没有任何关连。上述种种对协会在国内的知名度及发展实有一定影响，故协会来年在内地财务策划发展方向务必审慎处理，重整国内会务联系，以及全面展开中国之专业培训发展。

对社会的贡献

本会一直致力推动社区理财教育，参与由东华三院健康理财家庭辅导中心主办『财智 Goal 飞』教师社区协作计划之『第一届全港理财教育辩论比赛』，并由本人及本会理事黄毓平博士、何焯新先生及梁广雄先生担任赛事评判，传递正面理财知识予中学生；

另本会一直关注理财教育之推广工作，获东华三院健康理财家庭辅导中心邀请安排下，由本会副会长范维纲先生于社区主持教师培训及长者理财教育讲座，分别于2009年12月17日举办之『智醒理财』长者 FQ 进修计划之「智醒退休」长者 FQ 理财讲座，以及2010年2月22日教师培训工作坊，向逾百长者和教师灌输正确理财观念及价值观；另完成上年度教师财务策划培训后，本人亦于2009年11月27日举办校本理财教育系

列之『中学生财商·通识探究』教师培训讲座主讲，反应热烈。

此外，本会为英国注册财务会计师公会及香港伤健协会于2009年11月6日举办之伤健轮椅舞蹈慈善晚会支持机构之一，关注社会上不同阶层人士的需要，以回馈社会。

本会亦支持由社企民间高峰会于2009年11月13-15日举办之「国际研讨会-发展策略·伙伴同行·投资良机」推动社会企业、公民社会和企业公民。

值得欣喜，本会连续四年获香港社会服务联会颁发“同心展关怀”标志，嘉许本会于关怀社群、关怀员工及关怀环境之优秀表现。

业界专业支持

本会积极支持及推动专业财务策划发展，本会理事曾代表本会担任评审委员并以支持机构方式参加由香港专业教育学院(柴湾)工商管理系举办之「推广绿色生活 共建美好香江 全港高中学生电子心意设计比赛2010」、盛世传播有限公司持机构主办之第四届「盛世大中华企业品牌年奖2010」以及由美国友邦保险(百慕达)有限公司主办之“The AIA Outstanding Financial Planning Awards for Hong Kong Undergraduates 2010”。



施德芝博士
会长(2009/10)

本会亦协助发放大型活动—由香港特别行政区政府及香港贸易发展局主办之「亚州金融论坛」2010予会员参加，了解最新财务策划发展。

领导工作

作为本会会长，本人肩负带领本会迈向前的重任，领导理事会及各小组委员会，订定本会发展政策及方向，并确保切实执行。本人经常代表本会出席公众场合，发表意见，阐释本会使命和宗旨，推动财务策划专业更上一层楼。

会籍

截止2010年8月，本会会员总数约为3030人。

结语

本人很荣幸能够为注册财务策划师协会服务，亦很高兴在任内获各副会长：范维纲先生、梁宝衡先生及龙松荣先生、全体理事、秘书处、各小组委员会及资深会员们表达衷心的感谢，感谢你们对本人在任期间大力支持，全情投入会务。

最后，本人希望各位能继续支持来届理事会及日后协会举办之活动。谨此致衷心谢忱。