



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

2016 會長報告 2016 THE PRESIDENT' S REPORT

2016年8月31日
31 August, 2016



組織架構 管理委員會

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給會員的話 MESSAGES TO MEMBERS

過去十五個年頭，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 in the past fifteen years have been full of surprises and challenges, and proves to be valuable experience in my life. 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 my term of office in the last 12 months.

會長 黃敏碩先生
Mr. Michael WONG
President
(2015 / 2016)

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。是次比賽能夠榮幸地邀請香港證券業協會有限公司徐聯安博士蒞臨頒獎典禮並擔任主禮嘉賓，分享對香港財務策劃行業發展的遠見，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2016」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。

Upon successful premier of the 2015 Hong Kong Undergraduates Financial Planning Award, in which overwhelming support and participation from universities in Hong Kong and Macau were recorded, our Society progressed into the 6th Award competition last year and this challenging event received yet another warm welcome from the academic institutions in the region, and Dr. Gordon Tsui Luen-on, JP, Vice Chairmen of Hong Kong Securities Association (HKSA) was invited as the guest of honor to the Award final and hosted the award ceremony as well as to share his visions and experience in the finance industry. The participants were well benefited in the course of the event and rewarded with necessary guidance to prepare them for a future career in financial planning.

I hereby on behalf of our Society pay tribute to our colleagues, industry professional advice and universities in the region for their support, making this Award a fruitful and meaningful event to the community. The Award is now in its fifth year and is well set for undergraduates to present their cases during the period from August 2016 to November 2016, we look forward to another year of success in this Award and hope this will make a positive impact to the financial planning sector.



財務策劃教育 FINANCIAL PLANNING EDUCATION

為提高大眾對財務策劃專業的認知，本會理事亦被邀請於財務策劃專業相關的活動分享行業經驗和趨向。

For the purpose of stimulation of public awareness in financial planning profession, in the past fiscal year our councilors have been invited to participate in social activities with relative to the trade.

時間 Date	活動 Activities	主辦 Organizers
2015年12月23日 23 December 2016	AIA Campus Program 2016 - Management Associate Program Putonghua(MAPP) - I	AIA
2016年4月1日 1 April 2016	AIA Campus Program 2016 - Management Associate Program Putonghua(MAPP) - II	AIA
2016年6月18日 18 June 2016	長者理財講座 - 長者理財路路通 Investment Talk	東華三院黃祖棠家居照顧服務中心 T.W.G.Hs Wong Cho Tong Integrated Home Care Services Centre



獎學金 SCHOLARSHIP

為鼓勵成績優異的學生，本會於2016年6月贊助香港專業教育學院(葵湧分校)工商管理學系之「註冊財務策劃師獎學金」。

We also sponsored the "HKRFP Scholarship" to the Department of Business Administration, Hong Kong Institute of Vocational Education (Kwai Chung) in June 2016, as an encouragement for those students excel in good academic attainment.

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。

Another professional activity the Society engaged in was to promote professionalism of financial planning through different professional institutions.

時間 Date	活動 Activities	主辦 Organizers
2015年11月18日 18 November 2015	ASTRI Industry and University Collaboration Forum 2015 (IUCF)	The Hong Kong Applied Science and Technology Research Institute (ASTRI)
2015年12月11日 11 December 2015	機場三跑道系統研討會 Seminar on Three Runway System of Hong Kong International Airport	Dashun Policy Research Centre
2016年1月30日 30 January 2016	香港2040願景—優化土地供應、改善住房條件論壇 Forum on Optimizing Land Resources for Better Housing Provisions	Dashun Policy Research Centre
2016年4月6日 6 April 2016	第十六屆資本傑出企業成就獎 The 16th CAPITAL Outstanding Enterprise Awards	CAPITAL
2016年6月至 2017年3月 June 2016 - March 2017	香港無煙領先企業大獎2016 Hong Kong Smoke-free Leading Awards 2016	Hong Kong Council on Smoking and Health (COSH)



部分資料只有中文/英文。
Some information is available in only Chinese/English.

除了擔任業界活動的支持機構外，本會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。

Besides participating as a supportive organization, our councillors also acted as judges in activities of the financial planning industry and business management area.

時間 Date	活動 Activities	主辦 Organizers
2016年1月21日 21 January, 2016	都市卓越品牌大獎2015 Prime Awards for Brand Excellence 2015	都市盛世 Metro Prosperity
2016年4月7日 7 April, 2016	「香港最受歡迎品牌」2015年度頒獎典禮 Presentation ceremony of the Hong Kong Famous Brands 2015	亞洲品牌發展協會 Famous Brands Asia
2016年7月13日 13 July, 2016	都市傑出服務大獎2016 Metro Awards for Service Excellence 2016	都市盛世 Metro Prosperity



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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、英國註冊財務會計師公會香港分會、資訊財務師協會、商業風險評估專業協會及專業認證學院。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, with 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 Institute of Financial Accountants in Hong Kong, IT Accountants Association, The Institute of Crisis and Risk Management, The Society of Economists, and Academy of Professional Certification, all our seminars, in general, were warmly received by the attendants, responses were overwhelmingly positive, and there were good comments on the speaker's comprehensive knowledge on the subject, their delivery power, and interactive communication technique. Many of these talks are very visionary and have created an interactive platform between elite speakers and audience, composed mostly of practitioners in the financial planning profession.

時間 Date	活動 Activities	主辦 Organizers
2015年9月2日 2 September, 2015	Radiation:harm and help for you	周博文先生 防幅射會主席 Mr. Owen Chow Chairman Hong Kong Anti-e-smog Society
2015年10月13日 13 October, 2015	近視豈只是不便和視力問題，問題惡化可成公共衛生危機	黃偉雄先生 專業事務總監 香港護眼 Mr. Jack WONG Professional Affairs Director EyeCare HK
2015年11月25日 25 November, 2015	金融法律法規的最新發展 Latest developments in financial laws and regulations	柯曉宇 律師 康宏金融控股有限公司 Mr. Hugo Ngaw Legal Counsel Convoy Financial Services Limited
2015年12月10日 10 December, 2015	The annoying symptoms, the causes and the updated treatment of varicose veins (靜脈曲張)	顏令朱醫生 血管外科 Dr. Renny Yien General Surgeon specialized in Vascular Surgery

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時間 Date	活動 Activities	主辦 Organizers
2016年1月6日 6 January, 2016	古今兩個時代的生命探索 工具	馮應奇博士 指紋學專家 Dr. Kay Fung Specialist in Dermatoglyphics 鍾偉雄律師 數字學教師 註冊財務策劃師協會副會長 Mr. Gerard Chung Numerology Teacher Vice President of HKRFP
2016年2月1日 1 February, 2016	2016上半年投資分析 2016 Investment Outlook	黃敏碩先生 康宏證券及資產管理董事 Mr. Michael M.S. WONG Director Securities & Asset Management, Convoy Asset Management Limited
2016年3月9日 9 March, 2016	中國內地房地產買賣法律風 險防範經典案例分析	肖燕律師 廣東金陽律師事務所 Ms. Xiao Yan Guangdong Goldensun Law Office
2016年4月14日 14 April, 2016	社會企業互動關係	嚴俊民先生 香港社會企業策劃有限公司創辦人兼主席 Mr. Raymond C.M.YIM BCJ (Hon) MBA, MPhil (HKU), Founder of Hong Kong Social Enterprise Incubation Center Ltd.
2016年5月18日 18 May, 2016	中國內地遺囑和財產繼承經 典案例分析	肖燕律師 廣東金陽律師事務所 Ms. Xiao Yan Guangdong Goldensun Law Office
2016年6月20日 20 June, 2016	內地A股展望及原油投資 介紹	李梓維先生 機構客戶部 資本市場經理 南方東英資產管理有限公司 Mr. Alvin Li Associate Capital Markets Institutional Client Group CSOP Asset Management
2016年7月20日 20 July, 2016	英國脫歐公投後的外匯市 場機會	陳健豪 先生 阿布扎比證券香港有限公司零售市場銷售總監 Mr. Aaron Chan Director – Retail Sales, HK ADS Securities
2016年8月17日 17 August, 2016	2016下半年投資分析 2016 Investment Outlook	黃敏碩先生 康宏證券及資產管理董事 Mr. Michael M.S. WONG Director Securities & Asset Management, Convoy Asset Management Limited

放眼財務策劃發展

INSIGHT ON 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 businesses in global market. It is time to rethink the role and task of financial planner in catering aspiration to client's actual need in diverse economic developments. In this capacity, I did make frequent public appearances and speeches for the Society and on behalf of the interests of our members. We also consistently formulate different tasks and look for advancement and excellence for our members in the financial planning profession so as to overcome the challenging difficulties.



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。本會定必持續努力，履行社會責任和關愛。

We appreciate very much that The Hong Kong Council of Social Service has awarded us the Ten Years Plus Caring Organization Logo, as recognition to our outstanding commitment in Caring for the Community, Caring for the Employees and Caring for the Environment. We will definitely continue to perform social responsibility in the community with caring and sustaining effort.

鳴謝

ACKNOWLEDGEMENT

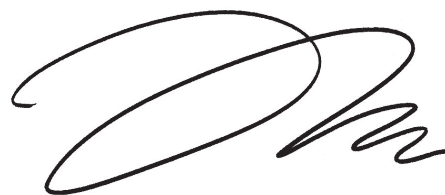
謹代表理事會全仁向本會贊助人和榮譽顧問衷心謝忱，感謝他們對協會的貢獻，慷慨地付出寶貴建議和支持，這些都是推動本會成功發展的重要因素。

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、梁廣雄先生和鍾偉雄律師、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 our hearty appreciation to our patrons and advisors, who had made contribution throughout the years. Their precious advice 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. Calvin Leung and Mr. Gerard Chung, the council members, the secretariat, sub-committees and fellow members for their unfailing 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
(2015 / 2016)

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