



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

“HONG KONG UNDERGRADUATE FINANCIAL PLANNERS OF THE YEAR AWARD 2023”  
(香港傑出大學生財務策劃師比賽 2023)

**Final Round Topic**

**11 November 2023**

## **Belt and Road Opportunities**

At the CEO Conference of the Third Belt and Road (“B&R”) Forum for International Cooperation held on 17 October 2023, The CE of the Hong Kong SAR, Mr. John Lee, commented that under the "one country, two systems" principle, Hong Kong has the distinctive advantages of enjoying strong national support and being closely connected to the world. Hong Kong is an international financial centre and the world's largest offshore Renminbi (“RMB”) business centre. Moreover, Hong Kong is committed to providing enterprises and economies in the B&R regions with high-quality professional services they need in such areas as project financing, risk management, international legal services and dispute resolution, construction works, shipping and logistics, innovation, technology and so on.

Assuming you are a senior executive of a financial institution delivering financial planning products in Hong Kong, what recommendations will you make to the Hong Kong SAR government such that the financial planning industry may benefit around the large pool of offshore RMB in Hong Kong. Your analysis may be focused on the following key areas:

1. How to develop financial planning products around the offshore RMB pool
2. How to access the immense B&R markets for the promotion of financial planning products
3. What policy initiatives should be implemented by the government to develop Hong Kong as an asset management hub for the B&R countries
4. How should Hong Kong compete effectively with our rivals in the region, such as Singapore and Japan

Notes:

1. Please state your assumptions in your analysis, such as economic growth, inflation and other demographic data, etc.
2. Please quote the source of data in your analysis.