



HKIB AGM Press Release

HKIB Announces Closer Ties with the Mainland Banking Industry

(26 June 2009, Hong Kong) The Hong Kong Institute of Bankers (HKIB) announced today at its Annual General Meeting (AGM) plans to step up its collaboration efforts with the China Banking Association (CBA) to promote closer cooperation between Hong Kong and the Mainland's banking industries. New endeavors include the mutual recognition of the two organizations' professional examinations and the holding of The First Wealth Management in Banking Summit in Beijing this July. Together with existing activities such as the China Outstanding Financial Management Planner Awards and the Annual HKIB Delegation to Beijing, the HKIB commits to promoting talents development and resource sharing between the Mainland and Hong Kong, which are important to the overall improvement of standards and practices in the banking industry. The closer ties with Mainland's banking sector also enable Hong Kong's banking and financial professionals better understand market requirements and opportunities in Mainland China. Coupled with their international experiences and global industry knowledge, Hong Kong's position as a global financial centre and an international financial training centre will further be strengthened.

"Today is a major milestone both for Hong Kong and the Mainland's banking industries. We are delighted that Mr Chen Yuan Nian, Secretary General of the China Banking Association joins our Annual General Meeting today, and will help us present certificates to the first batch of Hong Kong candidates passing the CCBP examination." expressed by Mr Peter Wong, President of HKIB "Since the signing of the Memorandum of Cooperation in 2006 in the Great Hall of the People in Beijing, the two organizations have forged stronger collaborations and we have jointly initiated the introduction of China Outstanding Financial Management Planner Awards and the holding of Thought Leadership Forum last year. We developed an important platform that helps nurture industry talents and promotes industry practices across China and Hong Kong's banking sector."

Mutual Recognition Facilitates Talents Exchange

HKIB's flagship program – Certified Financial Management Planner (CFMP) has been further strengthened since 2006, and is the only professional program that incorporates banking and wealth management practices and knowledge. In addition, CFMP also includes important elements such as China regulations and legal framework that are relevant to the banking industry development in Mainland China. More importantly, the HKIB has recently concluded mutual recognition arrangement with CBA's Certification of China Banking Professional (CCBP), making the Institute an important certifying partner of CBA and further promoting CFMP's status in the Mainland.

CCBP was introduced to the market in 2006 by CBA and until today over 1 million people have



taken the examination. Under the new mutual recognition arrangement, holders of CFMP Stage 1(Hong Kong) or above only need to pass CCBP's "Banking Fundamental Certificate" examination and will be awarded "Personal Wealth Management Certificate" by CBA. Meanwhile, Chinese holders of CCBP are only required to complete the "Banking and Financial Planning Regulations" and pass Stage 1 of CFMP (Hong Kong) examination held in the Mainland in order to obtain CFMP Stage 1's "Financial Planning Certificate". Furthermore, CCBP's "Personal Wealth Management Certificate" is automatically awarded to members completing Stage 1 of CFMP (China).

"We are extremely pleased to become a certifying partner for CCBP," explained by Mr Peter Wong. "The first "Banking Fundamental Certificate" examination in Hong Kong registered over a hundred entrants, and they will become the first batch of members obtaining both professional qualifications. On the other hand, the first CFMP examination will also be held in Beijing, Shanghai and Shenzhen in August 8 this year and response has been overwhelming. We are hopeful that this mutual recognition arrangement will further promote exchange of talents across the border".

First Launch of "The Wealth Management in Banking Summit" and the Launch of "2009 China Outstanding Financial Management Planner Awards"

"The Wealth Management in Banking Summit" and "2009 China Financial Management Planner Awards" are two major activities jointly organized by the HKIB and the CBA. The Forum is the first-ever regional gathering of experts and practitioners from the Mainland, Hong Kong and Taiwan to share on challenges and opportunities facing the wealth management market after the global financial turmoil. As a unique and strategic platform created for exchange of visions and practices among the 3 important markets, The Wealth Management in Banking Summit will be held on July 15 in Beijing.

2009 China Outstanding Financial Management Awards is officially launched today at the HKIB's Annual General Meeting. The Awards has become an authoritative annual event that promotes industry standards across China's wealth management sector.

"This year's HKIB delegation to Beijing will commence on July 14. Besides visiting The People's Bank of China and China Banking Regulatory Commission, discussions on future development of the banking sector will be held concurrently. Additionally, we will be taking part in The Wealth Management in Banking Summit, to witness this very first important occasion that gathers banking professionals from the Mainland, Hong Kong and Taiwan," commented by Mr Peter Wong.

First "HKIB Annual Banking Conference" Creates Regional Sharing Platform

The 61st International Banking Summer School (IBSS) brought to Hong Kong last year by the HKIB drew exciting support and participations from bankers from around the world. It further exemplified there is a surging need for high level exchange and sharing opportunities from



banking professionals in the region. The HKIB has thus decided to introduce the HKIB Annual Banking Conference this year on November 26, and has selected Asia's banking development as the focus of this year's conference. International banking experts and renowned professionals from Hong Kong and the Mainland will be invited to share at this major regional gathering, and will explore changes and opportunities facing Asia's banking markets in 2010. The HKIB positions this Conference as an anchor event for Asia's banking and financial industry, which will further enhance Hong Kong's position as a global financial centre and an international financial training centre.

Retail Banking Specification of Competency Standards Facilitates Promotion of Industry Standards

The Banking Industry Training Advisory Committee (ITAC) has completed drafting the "Specification of Competency Standards (SCS)" for the Retail Banking Sector under the Qualifications Framework, and is now ready for industry consultation. Views from trade associations, trade unions, professional bodies and related organizations are being invited. The consultation starts in mid June for 3 months, and the concluded Retail Banking SCS is expected to be introduced at the end of 2009.

Mr Peter Wong, as Chairman of the ITAC and President of the HKIB explained, "The HKIB has been elected as a member of the ITAC, and is also assigned the very important role of drafting the SCS. This is significant both to the Institute and to the banking industry. The SCS represents a truly critical reference to all levels in the industry. To employers, they can fully understand what are required in different job positions, and provide proper trainings to different staff based on their knowledge and standards. To employee, from understanding what are expected from his position and what his current competency level is, one can systematically plan and arrange appropriate continued education. For those who plan to enroll in the banking sector, the SCS offers them guidance for proper preparations. The HKIB strongly believes talents are an important foundation for the long term development of the banking industry. And the SCS plays an extremely important role in shaping the long term strategy in human resources development."

Chairman and Chief Executive, Wing Hang Bank Ltd and HKIB Executive Committee Chairman Dr. Patrick Fung also shared at the AGM the significant achievements of the Institute in the past year, "2008 marked the 45th Anniversary of the HKIB, and a series of important activities were lined up to celebrate this unique occasion. The 61st IBSS; the mutual recognition of AHKIB with Chartered Banker awarded by the Chartered Institute of Bankers in Scotland; 2008 Hong Kong Outstanding Financial Management Planner Awards, and 2008 China Outstanding Financial Management Planner Awards etc. This year, we will continue our focus on promoting industry standards, nurturing talents, and identifying more cooperation opportunities in the Mainland and internationally, with a mission to contribute significantly to the long term growth and development of Hong Kong's banking and financial industry."



The Hong Kong Institute of Bankers

Having served the local banking community since 1963, The Hong Kong Institute of Bankers (HKIB) is proud to be celebrating its 45th Anniversary this year. The Institute has currently 100 corporate members, representing 70,000 banking and finance professionals that forms the backbone of Hong Kong's banking and finance industry.

With a mission to offer best education and training services and to help nurture top qualified professionals for the sustainable development of Hong Kong's banking and finance sector, the HKIB provides comprehensive training and accreditation programs that include the two most important examinations AHKIB™ and CFMP™ and a wide spectrum continuous professional development and continuous professional training programs, professional certificate/diploma programs, professional training programs, workshops and conferences, free seminars and corporate training programs.

Committing to support professional development in the banking and finance sector, the HKIB was invited by the Education Bureau as a member of the Banking Industry Training Advisory Committee, assisting the design of the "competency standards". As a result, the Institute launched industry-wide survey and consultations that cover different spectrums within the industry to ensure the best use of education and training resources. HKIB continues to play an important role in the "Qualifications Framework" development.

To continuously promote Hong Kong as an international banking and financial center and to foster the development of the banking and financial industry in Hong Kong and the Mainland, the Institute has been working closely with the Mainland authorities and establishing a network of partners with professional associations and institutions to enable comprehensive, high-quality training for its members' operations as well as local banks in the Mainland.



2008 香港銀行學會週年大會

展現兩地緊密合作關係

(2009年6月26日,香港) 香港銀行學會在週年大會上宣布,為進一步加強中港兩地銀行業的交流合作,正積極與中國銀行業協會建立更緊密的合作關係,學會並將透過專業資格互認、在北京舉辦「第一屆銀行業財富管理業務發展論壇」、舉辦第三屆「2009 全國傑出財富管理師大獎」及訪京團等活動,促進兩地的人才培訓、資源分享及提升整體行業水平。兩地更緊密的合作,亦造就香港銀行業專才除擁有國際視野及專業知識外,同時熟識國內行業標準與發展需求的獨特優勢,進一步鞏固香港作為國際金融中心及國際金融培訓中心的地位。

香港銀行學會會長王冬勝先生表示:「今天是兩地銀行業發展的重要里程碑,我們十分榮幸,能夠邀請中國銀行業協會秘書長陳遠年先生參與香港銀行學會的週年大會,並且為首批取得中國銀行業從業人員資格認證 (CCBP) 的香港學員頒發證書。香港銀行學會與中國銀行業協會自 2006 年在北京人民大會堂簽署合作備忘錄,兩會近年來合作越趨緊密,如聯合舉辦的評選活動『全國傑出財富管理師大獎』、去年在港舉辦的『國際金融思想領袖論壇』等活動,是兩地培育行業專才與提升行業標準的重要平台。」

財富管理專業資格互認 促進中港兩地人才交流

香港銀行學會從 2006 年開始積極強化其旗艦課程 — 專業財富管理師(CFMP),成為市場上唯一具備銀行及財富管理知識專業資格的課程。此外,課程更針對國內銀行業發展需要,加入國內的法律和法規等重要元素。今年學會更率先與中國銀行業從業人員資格認證 (CCBP) 互認資格,成為香港唯一獲中國銀行業協會合作機構。

中國銀行業協會自 2006 年推出 CCBP 以來,有累計約超過 183 萬名人士報名參加。在資格互認安排下,持有香港版 CFMP 第一階段文憑或以上的會員只需在 CCBP 之「公共基礎」科考試中取得合格,即可獲取由中國銀行業協會頒發的「個人理財證書」。同時,持有 CCBP 的國內人士,亦只需修讀銀行及理財策劃規例,然後在國內舉行的第一階段 CFMP 考試中取得合格,便可獲得 CFMP 第一階段的「理財策劃文憑」;而持有中國版 CFMP 第一階段的會員,更可獲豁免考試,便取得 CCBP 「個人理財證書」。

王冬勝先生補充表示:「香港銀行學會十分高興成為 CCBP 的合作機構。香港 6 月初首次舉行的『公共基礎』考試,獲得過百名學員報考,他們將成為首批擁有兩地認可專業資格的行業專才。另一方面,在中國舉行的專業財富管理師(CFMP)考試亦將於本年 8 月 8 日在北京、上海及深圳舉行。我們期望藉著兩地的資格互認,能夠進一步加快人才流通。」

「第一屆銀行業財富管理業務論壇」及「2009 全國傑出財富管理師大獎」正式啓動

香港銀行學會與中國銀行業協會攜手舉辦兩大重點活動,分別是「第一屆銀行業財富管理業務論壇」及「2009 全國傑出財富管理師大獎」。論壇將於 7 月 15 日在北京舉行,並以國內、香港及台灣財富管理行業在金融海嘯下的挑戰與機遇為題,成為兩岸三地金融業首個交流平台,讓行業專才可以互相討論和分享經驗。同一時間,香港銀行學會亦藉著週年大會正式啓動「2009 全國



傑出財富管理師大獎」評選活動，透過這權威性的評選活動提升行業水平。

王冬勝先生續說：「今年的訪京團將於 7 月 14 日舉行，除了拜訪人民銀行及中國銀行業監督管理委員會外，亦會就未來銀行業的發展作深入探討。此行，我們將會參與『第一屆銀行業財富管理業務論壇』，見證首次結合兩岸三地財富管理專才的交流活動。」

首屆「銀行家高峰研討會」以打造區內銀行業週年交流活動

去年在香港舉行的第六十一屆「國際銀行家高峰研討會」IBSS 得到全球銀行業界的熱烈支持和參與，同時顯示香港專才對高層次的交流活動需求殷切。因此，香港銀行學會將於 2009 年 11 月 26 日舉辦首屆「銀行家高峰研討會」，並以亞洲銀行業發展為重點。高峰研討會將邀請香港、國內及國際的行業專家、學者及著名銀行家出席，與業界探討 2010 年亞洲銀行的新機遇及銀行業面臨的轉變。學會期望研討會能成為香港以至亞洲區銀行及金融業的週年重點交流活動，從以鞏固香港作為國際金融中心及國際金融培訓中心的地位。

2009 零售銀行資歷架構「能力標準說明」將有助持續提升行業水準

銀行業行業培訓諮詢委員會（諮委會）已完成制訂零售銀行業《能力標準說明》的草擬本，現正就其內容向業界的僱主商會、僱員工會、專業團體及相關機構等進行諮詢程序。諮詢期由 2009 年 6 月中開始為期三個月，預計香港零售銀行資歷架構「能力標準說明」將於 2009 年年尾推出。

身兼銀行業培訓諮詢委員會主席的香港銀行學會會長王冬勝先生指出：「香港銀行學會被選為銀行業培訓諮詢委員會成員之一，更擔任資歷架構『能力標準說明』撰寫的重要角色，任重而道遠。『能力標準說明』的制定，對業內不同階層都有莫大的幫助；對僱主來說，可讓他們掌握不同崗位所需的工作能力，了解員工知識及水準，並提供合適的培訓課程；對現職從業員而言，他們可以從工作所需的標準，知道自己的水平，從而有系統地選擇合適的進修課程，提升專業水平。而有意投身銀行界的人士，『能力標準說明』讓他們能夠因應資歷架構內所列的準則，率先為入行做好準備。學會深信人才是行業長遠發展的重要基石，在專才發展的長綫策略中，『能力標準說明』將擔當極為重要的角色。」

藉著週年大會，永亨銀行董事長兼行政總裁兼香港銀行學會理事會主席馮鈺斌博士對學會過去一年的努力作出總結：「2008 年是學會第 45 週年紀念，舉辦了多個令人難忘的重點活動，包括第六十一屆國際銀行家高峰研討會、會士資格(AHKIB) 與蘇格蘭特許銀行學會的(Chartered Banker)資歷互認協議、2008 年香港銀行學會『傑出財富管理師大獎』、『2008 全國傑出財富管理師大獎』。今年，學會將繼續致力提升行業標準，培育人才，開拓更多更廣泛與國內以至國際間的合作機會，為香港銀行金融業界的長遠發展作出貢獻。」