



The **12th** **HKIB**
Outstanding
Financial Management Planners
AWARDS

AWARDS
PRESENTATION
& GALA DINNER

22 February 2019

Jointly organised by:



香港銀行學會
The Hong Kong Institute of Bankers

CTgoodjobs
Powered by Career Times



香 港 銀 行 學 會

The Hong Kong Institute of Bankers

Contents

- 02 About the Awards
- 02 Categories & Eligibility
- 03 Past events photos
- 04 Congratulatory Messages
 - Message from James H. LAU Jr. JP
Secretary for Financial Services and the Treasury, HKSAR Government
 - Message from Dr CHAN Sau San, Ph.D.
Chairman of the Board of Directors, Monetary Authority of Macao
 - Message from Mr Peter WONG, JP FHKIB
President, The Hong Kong Institute of Bankers
 - Message from Dr Patrick FUNG, JP FHKIB
Chairman, Executive Committee, The Hong Kong Institute of Bankers
 - Message from Prof Kalok CHAN
Chairman, Organising Committee
The 12th HKIB Outstanding Financial Management Planner Awards
- 09 Advisory Board
- 10 Panel of Judges - Final Round
- 12 Panel of Judges - Round 2
- 14 Organising Committee
- 15 Winners of Certificate of Merit
- 21 Winners of Bronze Award
- 24 Winners of Silver Award
- 26 Winners of Grand/Gold Award
- 31 Acknowledgement
- 32 About the Organisers

About the Awards

Now in its twelfth year, the annual **Hong Kong Institute of Bankers (HKIB) Outstanding Financial Management Planner (OFMP) Awards** is an award that aims to drive best practice standards for financial planning and wealth management practitioners in the banking and financial services industry. To achieve the purpose of best operational practices and attitudes aligned with clients' interests, a stringent judging methodology and criteria are used in order to accomplish the following objectives:

- To increase public awareness of the importance of financial planning and wealth management
- To enhance the competitive edge of practitioners in the banking and financial services sectors
- To emphasise the importance of ethical selling and product suitability for customers
- To recognise individuals who excel in the financial planning and wealth management profession

Categories & Eligibility

According to years of experience as a financial management planner and the customer segment, participants shall compete in **one** of the three categories (A, B or C) shown below:

Group A General Wealth Management Customer, Financial Management Planners with **up to 3 years of experience**

Group B General Wealth Management Customer, Financial Management Planners with **over 3 years of experience**

Group C High Net Worth Customer, Financial Management Planners with **customers' investable assets over US\$ 1 million** (excluding primary residence)

Past events photos



Message From

James H. LAU Jr. JP

*Secretary for Financial Services and the Treasury
HKSAR Government*



Congratulations to the winners of the 12th Hong Kong Institute of Bankers (HKIB) Outstanding Financial Management Planner Awards. Your professionalism, expertise, and dedication to the highest standards of excellence are absolutely critical to the development of Hong Kong as the leading wealth management hub in Asia.

Indeed, talent is one of the most important ingredients for the success of an international financial centre like Hong Kong. I thank the Institute for organizing the Awards and I wish the winners every success in the future.

A stylized, handwritten signature in black ink, consisting of a large, sweeping initial 'J' followed by a series of smaller, connected strokes.

James H. LAU Jr. JP

*Secretary for Financial Services and the Treasury
HKSAR Government*

Message From

Dr CHAN Sau San, Ph.D.

Chairman of the Board of Directors

Monetary Authority of Macao



Against a background of heightened volatilities in the global financial markets, the role played by long-term financial planning has become more prominent. While the Greater Bay Area development will certainly create enormous business opportunities in the region, it also underscores the need for more varieties of financial planning and wealth management strategies to meet different purposes of financial investment.

The OFMP Awards programme not only offers a valuable opportunity for financial planning practitioners to share working experiences and knowledge, it also advocates best practice standards which help to increase the public confidence in financial planning and management services. In particular, the Awards stand for tokens of excellent performance in the profession.

Congratulations to the 12th Award winners and I wish them every success in their career development.

A handwritten signature in black ink, consisting of a stylized, cursive 'C' followed by a horizontal line and a small flourish.

CHAN Sau San, Ph.D.

Chairman of the Board of Directors

Monetary Authority of Macao

Message From

Mr Peter WONG, JP FHKIB

President

The Hong Kong Institute of Bankers



Over the years, Hong Kong has developed into a prominent wealth management centre in Asia Pacific, and the sector has proven to be a growth engine within the city's successful financial services landscape. There are a number of key regional aspects that are dominating the outlook, including national economic initiatives such as the Guangdong-Hong Kong-Macao Greater Bay Area, major technological advances as well as the burgeoning wealth of high-net-worth individuals. This combination of opportunities

provides promise and increasingly stimulating times for wealth management and financial planning professionals

I would like to extend my congratulations to all the winners of the 12th HKIB Outstanding Financial Management Planner Awards, who demonstrated great accomplishments over the past year in helping clients reach their financial goals. I wish all winners continued success in their career and I believe their dedication and hard work will ensure Hong Kong retains its position as a leading global wealth management hub in the future.

A handwritten signature in black ink, appearing to read 'Peter T S Wong', written in a cursive style.

Peter T S WONG, JP FHKIB

President

The Hong Kong Institute of Bankers

Message From

Dr Patrick FUNG, JP FHKIB

Chairman, Executive Committee

The Hong Kong Institute of Bankers



Since its inauguration in 2006, the HKIB Outstanding Financial Management Planner Awards have been the event for talented wealth management professionals to receive well-deserved recognition from an independent industry body. As we celebrate the 12th HKIB Outstanding Financial Management Planner Awards today, I would like to extend my sincere congratulations to all the winners and acknowledge the dedication and efforts of all participants in making this annual event a

resounding success. Your hard work is commendable.

I must also thank everyone who has contributed to the success of this 12th HKIB Outstanding Financial Management Planner Awards. The staunch support from all member banks and financial institutions, the regulators and professional bodies; the Organising Committee and the Panel of Judges. And, finally, the marvelous presentations by all contestants.

A handwritten signature in black ink, appearing to read 'Patrick Fung'.

Dr Patrick FUNG, JP FHKIB

Chairman, Executive Committee

The Hong Kong Institute of Bankers

Message From

Prof Kalok CHAN

Chairman, Organising Committee

The 12th HKIB Outstanding Financial Management Planner Awards



The winners of the 12th HKIB Outstanding Financial Management Planner Awards have once again demonstrated the excellence and professionalism of Hong Kong talent within the Financial Management sector. My heartfelt congratulations to all practitioners receiving their Awards today.

Competition in this year's Award has been intense as always. I am delighted to see high quality presentations made, for this reflects the practitioners' dedication to continuous enhancement, and their awareness of an increasingly complex economic environment in Hong Kong.

In this year's competition, our contestants have shown their commitment to high standards in competence and ethics. Importantly there has also been a concerted effort to ensuring a relentless focus on the customers. We are confident that they will continue to uphold these important values, and maintain Hong Kong's position as a regional wealth management hub.

I would also like to thank everyone on the Panel of Judges, including representatives from the regulators, and academic, banking and financial institutions. Their contribution is highly appreciated.

I look forward to hearing the success stories of our wealth management professionals and the contribution they will bring to our society. Congratulations!

A handwritten signature in black ink, appearing to read 'Kalok Chan'. The signature is fluid and cursive, written on a light-colored background.

Prof Kalok CHAN

Chairman, Organising Committee

The 12th HKIB Outstanding Financial Management Planner Awards

Advisory Board



Raymond CHAN
Executive Director
Banking Supervision
Hong Kong Monetary Authority



Derek WONG
Vice Chairman
Dah Sing Bank, Limited

Listed in alphabetical order by organisation name then last name

Panel of Judges

Final Round: Best of the Best



LO Wai Man, Mary
General Manager,
Personal Banking Products Department
Bank of China (Hong Kong) Limited



CHIU Wai Ling, Venus
Executive General Manager,
Private Banking & Wealth Management
Personal & Business Banking Group
China CITIC Bank International Limited



LEE Wai Yin, Anne
Deputy Head of Personal & Business Banking Group
and Head of Sales & Distribution
Personal & Business Banking Group
China CITIC Bank International Limited



Prof Kalok CHAN
Dean, CUHK Business School
The Chinese University of Hong Kong



Phoebe WONG
Senior Executive Director & Head of Retail Banking Division
Dah Sing Bank, Limited



Belinda HSIEH
Executive Director, Treasures Investment Advisory Head
DBS Bank (Hong Kong) Limited

Listed in alphabetical order by organisation name then last name

Panel of Judges

Final Round: Best of the Best



Carol WONG

Head of Relationship Management
The Hongkong and Shanghai Banking Corporation Limited



Gordon Y. N. TANG

Professor, Department of Finance and Decision Sciences
Hong Kong Baptist University



Alan AU

Executive Director (Banking Conduct)
Hong Kong Monetary Authority



WAN Ho Fung, Jonathan

Deputy Head of Retail Banking
Industrial and Commercial Bank of China (Asia)
Limited



MUI Yuet Sheung, Wendy

Deputy Chief Executive
Nanyang Commercial Bank, Limited



Christina CHOI

Executive Director (Investment Products)
Securities and Futures Commission

Listed in alphabetical order by organisation name then last name

Panel of Judges

Round 2: Closed Door Oral Presentation



KO Yiu Ho, Neville
Assistant General Manager,
Head of Investment Product Specialists &
Investment Strategies
Bank of China (Hong Kong) Limited



YEUNG Wai Ping, Stephen
General Manager of Retail Business
Management Department
Bank of Communications (Hong Kong)
Limited



CHEUNG Chi Kwan, Lupina
Head of Branch Distribution & Services
Department
The Bank of East Asia, Limited



LO Sui Yan, Rex
Managing Director
Business Development
BEA Union Investment Management
Limited



CHEUNG Man Wah, Poly
General Manager & Head of Branch
Banking, Sales & Distribution
Personal & Business Banking Group
China CITIC Bank International Limited



PUK Wing Ting
Executive Deputy General Manager &
Head of Relationship Management
Personal & Business Banking Group
China CITIC Bank International Limited



CHAN, Alan KF
Assistant General Manager, Head of
Investment and Securities Services
China Construction Bank (Asia)
Corporation Limited



Josephine LEE
Head of Retail Bank
Citibank (Hong Kong) Limited



Cliff CHAN
General Manager, Head of Wealth
Management
Dah Sing Bank, Limited

Listed in alphabetical order by organisation name then last name

Panel of Judges

Round 2: Closed Door Oral Presentation



Michelle YAM

Deputy Head of Private Banking & Senior
Managing Director
EFG Bank AG



Wallace LAM

Head of Wealth Sales Distribution
Hang Seng Bank, Limited



Karen LAM

EVP Head of Relationship Management
Hang Seng Bank, Limited



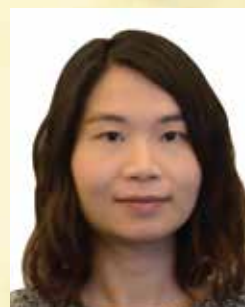
Vicky YAU

Head of Wealth Insurance Sales
The Hongkong and Shanghai Banking
Corporation Limited



Wendy YEUNG

Division Director Central Division
The Hongkong and Shanghai Banking
Corporation Limited



Beanie FONG

Wealth Management Product Head
Industrial and Commercial Bank of
China (Asia) Limited



HUI Wai Hing, Peter

Assistant Chief Executive
Nanyang Commercial Bank, Limited



LAM Kin Ho

General Manager, Personal Product
Management Department
Nanyang Commercial Bank, Limited



CHONG Hey, Janet

EVP, Chief of Wealth Management
Shanghai Commercial Bank Limited

Listed in alphabetical order by organisation name then last name

Organising Committee

Chairman

Prof Kalok CHAN

Dean, CUHK Business School
The Chinese University of Hong Kong
Members

Members

FU Shuk Man, Cindy

Senior Investment Product Specialist
Bank of China (Hong Kong) Limited

MA Yiu Fung, Axel

Investment Product Specialist
Bank of China (Hong Kong) Limited

TSE Yik Yu, Simon

Senior Sector Head of Investment Product Specialists
Bank of China (Hong Kong) Limited

TANG Chak Hong

Chief Manager, Investment Services
Bank of Communications (Hong Kong) Limited

LEUNG Hoi Ting, Iris

Senior Investment Consultant
The Bank of East Asia, Limited

MUNG Kenny

Investment Consultant
The Bank of East Asia, Limited

TONG Yiu Kai, Calvin

Investment Consultant
The Bank of East Asia, Limited

CHOW Sze Wai, Stella

Assistant General Manager &
Head of People Engagement & Competency Development
Personal & Business Banking Group
China CITIC Bank International Limited

LO Wing On, Gordon

Principal Investment Consultant,
Investment Advisory & Strategy
Personal & Business Banking Group
China CITIC Bank International Limited

Betty KWOK

Senior Training Manager
Citibank (Hong Kong) Limited

Anthony WONG

District Manager
Citibank (Hong Kong) Limited

WONG Wai Lam

Head of GCB Business Training
Citibank (Hong Kong) Limited

Vivian CHAN

Senior Manager, Investment Product
Dah Sing Bank, Limited

Florence CHEUNG

Head of Segment & Product Management
Dah Sing Bank, Limited

Calvin CHAN

Vice President and Financial Services Manager
Hang Seng Bank Limited

Alex LO

Vice President and Investment Services Manager
Hang Seng Bank Limited

Doris FONG

Manager Insurance Academy
The Hongkong and Shanghai Banking Corporation Limited

Kenny KWONG

Senior Branch Academy Manager
The Hongkong and Shanghai Banking Corporation Limited

Helen YEUNG

Manager Wealth Investment Academy
The Hongkong and Shanghai Banking Corporation Limited

Listed in alphabetical order by organisation name then last name

Winners of Certificate of Merit



Bank of China (HK) Limited

Group B



**TSE Hing Cheong,
Steven**



Bank of Communications (Hong Kong) Limited

Group B



LIU Hiu Tung



The Bank of East Asia, Limited

Group A



**LEE Chi Leung,
Stephen**

Listed in alphabetical order by organisation name then last name

Winners of Certificate of Merit



Chief Group Limited

Group A



CHEUNG Yat Sing



China CITIC Bank International Limited

Group B



WONG Chun Kit



China Construction Bank (Asia) Corporation Ltd

Group B



LAI Sze Ping


Group C



CHENG Mun Wa

Listed in alphabetical order by organisation name then last name

Winners of Certificate of Merit

 **Citibank (Hong Kong) Limited**

Group A



**SIU Wan Man,
Phoebe**

Group B



**CHEUNG Ka Wai,
Carrie**



**WONG Siu Kit,
Darren**

 **CONVOY 康宏 Convoy Financial Services Limited**

Group A



**CHE Kwok Kwan,
Tracy**



**FOK Chun Mun,
Ken**

 **大新銀行 DAHSINGBANK Dah Sing Bank, Limited**

Group A



**CHAN Hoi Ki,
Michael**



NGAI Tsz Yau, Ben



**YEUNG Ho Ching,
Bobby**

Group B



**CHAN Lai Mei,
Christy**

Listed in alphabetical order by organisation name then last name

Winners of Certificate of Merit



恒生銀行
HANG SENG BANK

Hang Seng Bank Limited

Group A



LAM Cheuk Yat,
Jeffrey



LAM Fung Shun,
Anthony

Group B



YUEN Wing Han,
Winnie



HSBC

The Hongkong and Shanghai Banking Corporation Limited

Group A



HO On Yee



YEUNG Nam Kei

Group B



CHAN Chi Yuen



CHIN Ka Chun,
Wilson

Group C



KO Pui Ki



MIU Ki Wai



WONG Tak Wai

Listed in alphabetical order by organisation name then last name

Winners of Certificate of Merit

ICBC  **工银亚洲 Industrial and Commercial Bank of China (Asia) Limited**

Group A



ZHENG Ming Yu,
Olivia



ZHONG Wen Qi,
Viki

Group B



LAW Pui Yi, Kylie

 **NCB**
南洋商業銀行

Nanyang Commercial Bank, Limited

Group A



KWONG Wing Yi



TSUI Yuen Tung

Group B



CHAN Yan Yu



CHOW Yim Fun



KOK Hiu Yan



LAM Kar Kay

Listed in alphabetical order by organisation name then last name

Winners of Certificate of Merit



Nanyang Commercial Bank, Limited

Group B



**LEE Ming Kin,
Louis**



LUI Po Shan



TSANG Chi Hung



Shanghai Commercial Bank Ltd.

Group B



LAI Chi Hung

Listed in alphabetical order by organisation name then last name

Winners of Bronze Award



中國銀行(香港)
BANK OF CHINA (HONG KONG)

Bank of China (Hong Kong) Limited

Group B



**HO King Sum,
Sam**



BEA 東亞銀行

The Bank of East Asia, Limited

Group C



LAM Chun Nam



中国建设银行(亞洲)
China Construction Bank (Asia)

China Construction Bank (Asia) Corporation Ltd

Group A



TSANG Chun Kit


Group C



TUNG Ho Nam

Listed in alphabetical order by organisation name then last name

Winners of Bronze Award

 **Citibank (Hong Kong) Limited**

Group A



**WONG Ka Ning,
Karen**

Group C



**WONG Chun Man,
Thomas**

 **大新銀行 Dah Sing Bank, Limited**

Group B



MOK Chi Kit, Ray

 **HSBC The Hongkong and Shanghai Banking Corporation Limited**

Group A



GOULD Carmen



KWONG Yun Lam

Listed in alphabetical order by organisation name then last name

Winners of Bronze Award



HSBC The Hongkong and Shanghai Banking Corporation Limited

Group B



CHAN Man Lung

Group C



CHENG Pak Hang

ICBC 工银亚洲 Industrial and Commercial Bank of China (Asia) Limited

Group B



XU Xi, Lawrence

Listed in alphabetical order by organisation name then last name

Winners of Silver Award



Bank of China (HK) Limited

Group B



HSIEH Hong



China Construction Bank (Asia) Corporation Limited

Group C



MAK Lok Ching



Dah Sing Bank, Limited

Group C



**WANG Yixin,
Cindy**

Listed in alphabetical order by organisation name then last name

Winners of Silver Award



HSBC The Hongkong and Shanghai Banking Corporation Limited

Group A



LIANG Jianyi



TO Siu Fung

Group B



KO Wai Yin

Group C



**CHENG Yuk Kwan,
Prisilla**



**NCB
南洋商業銀行**

Nanyang Commercial Bank, Limited

Group A

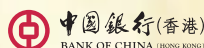


**KWOK Bik Yu,
Briscilla**

Listed in alphabetical order by organisation name then last name

Winners of Grand/Gold Award

Group A



中國銀行(香港)
BANK OF CHINA (HONG KONG)

Bank of China (Hong Kong) Limited

CHAN Kei, Kay



It is my great honor and privilege to represent my company, Bank of China (Hong Kong) as one of the three finalists in the 12th HKIB Outstanding Financial Management Planner Awards. This is such a valuable experience in my career. I would like to express my sincere thanks to my company's management for granting me such opportunity to participate in this meaningful competition.

This competition reminds me the importance of "Financial Planning" in my career. The competition had definitely broadened my horizon and enhanced my communication as well as my presentation skills, which would absolutely benefit my future career.

Besides, I would like to express my deepest gratitude to all judges of this

competition. Their feedback not only helps to improve my performance and make me one of the finalists in this contest, but also bring me inspirations to provide all-round financial planning services. That would be the beacon light that guides me to truly become an outstanding financial management planner.

Last but not least, I have to give special thanks to the senior management of my company and my colleagues, who had shown full supports and encouragement throughout the whole competition. This award should be shared with them.



中國銀行(香港)
BANK OF CHINA (HONG KONG)

Bank of China (Hong Kong) Limited

NG Cheuk Kin, Franky



It is an honor and privilege to represent Bank of China (Hong Kong) to join the 12th HKIB Outstanding Financial Management Planner Awards. Being a part of this journey is definitely one of the most rewarding experiences I have ever been involved in. From drafting the Financial Plan to presenting my ideas, I have been able to use my financial knowledge to build a customized financial plan for my client. Participating in this competition has enhanced my competency and integrity as a Financial Planner.

I am also grateful that I have been given the opportunity to speak to a distinguish audience of business leaders. We were able to share our views on financial planning and best practices in wealth management.

Their insights and expertise are invaluable to me. I would like to take this opportunity to express my sincere gratitude and thanks to the senior management for the enormous help I received during this competition. Additionally, I am deeply appreciative of my company, Bank of China (Hong Kong) for giving me the chance to broaden my horizon. This experience has been diverse and challenging but most of all, fascinating!

Listed in alphabetical order by organisation name then last name

Winners of Grand/Gold Award

Group A



Bank of China (Hong Kong) Limited



YIM Chun Wai, Eric

I am extremely honored to represent Bank of China (Hong Kong) for one of top 3 finalists of the 12th HKIB Outstanding Financial Management Planner.

First of all, I would like to express my sincere appreciation to HKIB for their recognition and encouragement. It was definitely a precious experience to broaden my knowledge and expertise in the financial field.

In addition, I have faced several challenges and tremendous pressures during the competition. It is my team who have supported me and enhanced my knowledge of wealth management along the journey. Without them, I will not win this award nor become a more professional financial planner. I would like to give a special thanks to my company, Bank of China (Hong Kong) and my colleagues for their continuing support and encouragement. The award is surely one of my greatest achievements in 2018. I will try my best to contribute to further growth of my work. Thank you so much!

Group B



Citibank (Hong Kong) Limited



WU Kai Ting, Woody

It is my distinct honor and pleasure to represent Citibank in the 12th HKIB Outstanding Financial Management Planner Awards. I am grateful to be one of the three finalists. Participating in this competition has been a major milestone in my career. From drafting the proposal to final presentation, it has all been a memorable and treasurable experience. The award encourages me to strive for greater achievements in the future.

I would like to express my deepest gratitude to senior management and the Citibank support team. Thanks for all the encouragement, training and precious advice. They inspired me and strengthened my knowledge and presentation skills, which enable me to deliver quality service to our clients.

Finally, I would like to thank my wife, friends and colleagues who supported me throughout the competition. Without your encouragement I would not have completed all the challenges so smoothly. It's a pleasure to share the glory with all those who helped and inspired me along the way.

Thank you.

Winners of Grand/Gold Award

Group B



The Hongkong and Shanghai Banking Corporation Limited

HUNG Kwok Hei, Wicky

It is my greatest honor and pleasure to represent HSBC as one of the finalists in the 12th HKIB Outstanding Financial Management Planner Awards. My deepest appreciation goes to HKIB for nominating me and I shall forever remain grateful for the recognition that I have received. Allow me to state that although this is a personal award, it is and will always remain as a result of dedicated teamwork, involving our HSBC senior management and all internal task force for all the encouragement and support throughout this journey.

I have faced several challenges on my way here, but they are exactly what strengthened me and made me the person I am today. The competition has enriched my professionalism and competency, given me the opportunity to reflect on the attributes of being an outstanding financial planner.

I sincerely thank all who have supported me and helped me to reach this stage where I can proudly uphold this award as a mark of my achievement. I also promise to get better at my work so that you can see me here for more recognitions in the future. Thank you!



The Hongkong and Shanghai Banking Corporation Limited

LAM Siu Lun

It is my absolute honor to participate in the 12th HKIB Outstanding Financial Management Planner Awards. I am truly blessed to work here in HSBC and am thankful for this valuable learning opportunity given by HKIB and our wonderful top management.

I would like to share this award with our whole training team for their strong and dedicated support throughout this journey. They willingly devoted their time in sharing financial planning related knowledge, supplementing with the most updated industry news for my preparation.

Throughout the whole competition, I am able to see financial planning from a more macro perspective. It also further strengthens my knowledge to better become an outstanding financial planner in order to bring quality service to our customer and continue to raise the industry standards.

Last but not least, I would like to end my appreciation to my family who unconditionally supported me during the whole competition.

Listed in alphabetical order by organisation name then last name

Winners of Grand/Gold Award

Group C



中國銀行(香港)
BANK OF CHINA (HONG KONG)

Bank of China (Hong Kong) Limited



CHAN San Heung, Sam

To begin with, I would like to take this precious opportunity to express my sincere gratitude to Bank of China (Hong Kong). With the endless support from my senior management and colleagues, I can strike my best to achieve my goal and become one of the top three (Group C) in 12th Outstanding Financial Management Planner Awards. I also enjoy every moment of the competition since it represents what team work spirit is.

What is more, I would like to thank Hong Kong Institute of Bankers for providing such an excellent platform in which financial professionals could always seek a higher level of wealth management standard in a competitive competition. Every participant will make use of all financial knowledge they have to decide a proper financial plan for clients.

As an old saying goes “No pain, No gain”. Without doubt, the difficulties I faced during the competition, though challenging, but are rewarding in other aspects. For example, it enhances my professionalism in financial analysis, presentation and communication skills, which is valuable in my career. I will not hesitate to encourage those who are willing to take challenge to join the OFMP Awards.

All in all, it is my great honor to represent Bank of China (Hong Kong) to participate in the OFMP Awards with fully support of my senior management. I believe that I will turn a new chapter both in my life and career.



The Hongkong and Shanghai Banking Corporation Limited



TONG Shu Kit

Being one of the HSBC representatives in this meaningful event is an honor to me. I would like to express my deepest gratitude to HSBC, in particular to my line managers and our senior management for nominating me to embark on this wonderful journey.

A special mention to my wife for her tireless support to the family throughout the contest. Without which, I would not have been able to get to this far without much to worry.

No pain no gain certainly holds truth for this tough competition. Yet the experience and recognition, not to mention the personal breakthrough, is to be cherished for life.

Finally, my heartfelt appreciation to HKIB for this wonderful platform to challenge us to constantly up-skill our financial planning knowhow, for the benefits of our customers, as well as upholding the integrity of the industry.

May all contestants pass the baton and I sincerely wish all future contestants the best of luck!

Winners of Grand/Gold Award

Group C



The Hongkong and Shanghai Banking Corporation Limited



YUEN Siu Fung

I would like to take this opportunity to express my appreciation towards HSBC for offering me a chance to participate in the 12th HKIB OFMP Awards. I felt honored and privileged to be involved, given that this is an exceptional platform to share the best practices amongst elites in the industry.

It has been a bitter-sweet journey and I could not have gotten this far without the support from HSBC, our senior management, my greatest supporting shields, my mentors and family. My utmost appreciation goes to my wife's unlimited support throughout the journey.

I have gone through many ups and downs and encountered an abundance of difficulties that require support from my team. This did not hold me back from achieving my goals. Instead, I have gained substantial knowledge in financial planning, strengthened my mindset and became a better individual.

The achievement of being one of the three finalists has become an important milestone of my career and also a thriving recognition to my support team. Last but not least, I will utilize this invaluable experience to help more people in realizing their goals in the journey of life.

Acknowledgement

The Hong Kong Institute of Bankers wishes to thank our lead sponsor, supporting organisations, judges, moderators and contestants for their genuine efforts and hard work in making the 12th HKIB Outstanding Financial Management Planner Awards a success.

Supporting Organisations



HONG KONG MONETARY AUTHORITY
香港金融管理局



SECURITIES AND
FUTURES COMMISSION
證券及期貨事務監察委員會



保險業監管局
Insurance Authority



強制性公積金計劃管理局
MANDATORY PROVIDENT FUND
SCHEMES AUTHORITY



HK
FINANCIAL
SERVICES
DEVELOPMENT
COUNCIL
香港金融發展局



澳門金融管理局
AUTORIDADE MONETÁRIA DE MACAU



HK
IFA
香港投資基金公會



Private Wealth
Management
Association



平等機會委員會
EQUAL OPPORTUNITIES COMMISSION



投委會
IFEC



CUHK Business School
The Chinese University of Hong Kong



香港浸會大學
HONG KONG BAPTIST UNIVERSITY

Participating Organisations



真生活 真夥伴
THE REAL LIFE COMPANY



中國銀行(香港)
BANK OF CHINA (HONG KONG)



交通銀行
BANK OF COMMUNICATIONS
SINCE 1908 YOUR WEALTH MANAGEMENT BANK



BEA 東亞銀行



BEA Union
Investment



致富 CHIEF
證券 | 期貨 | 理財



中信銀行(國際)
CHINA CITIC BANK INTERNATIONAL



中國建設銀行(亞洲)
China Construction Bank (Asia)



CONVOY 康宏



大新銀行
DAH SING BANK



DBS



恒生銀行
HANG SENG BANK



HSBC



ICBC 工銀亞洲



NCB
南洋商業銀行



上海商業銀行
SHANGHAI COMMERCIAL BANK

Organisation listed in alphabetical order

Jointly organised by:



香港銀行學會
The Hong Kong Institute of Bankers



Powered by Career Times

About the Organisers

The Hong Kong Institute of Bankers

The Hong Kong Institute of Bankers (The HKIB) has been serving the local banking community in the provision of education and training since 1963. In 1995, with the encouragement and support of the local banking community, the Institute declared its independence from its parent institute in UK. With an independent status, the Institute is able to better serve the training needs of the bankers in the region and to reflect the importance of Hong Kong as an international financial center.

The continuous professional development program, which comprises of professional examinations and training courses, has helped bank employees to make advancements in their banking career, and is valued by most of them who are determined to strengthen their knowledge base.

In view of the changing landscape of the banking industry in Hong Kong, the importance of continuous professional development and education in this competitive financial market has gained increasing attention. The professional examinations and training programs are offered for members or bank staffs to equip with the essential skills and knowledge to help them "fast-track" their management career.

CTgoodjobs

CTgoodjobs, a unique brand extension launched in 2011, carries through Career Times Online Limited's commitment to quality and integrity in recruitment advertising.

CTgoodjobs has long pledged to protect job seekers from employment frauds with a designated team to verify job advertisements. To further honour its commitment, CTgoodjobs took the lead as the first local recruitment portal to refuse blind advertisements as of July 2014. CTgoodjobs also breathed new life into the job advertising industry with its pioneering job categorisation model and optimised job search engine.

With an active member population of 600,000 and 1,000,000 daily page views, CTgoodjobs launched a new mobile app in 2014. Innovative functions such as Mobile CV and CV import from Dropbox attract more than 100,000 daily screen views, and provide users with a superior job-seeking experience.

HKIB Hong Kong Head Office

3/F Guangdong Investment Tower, 148 Connaught Road, Central, Hong Kong
T: (852) 2153 7800 F: (852) 2544 9946 E-mail: hkib@hkib.org <http://www.hkib.org>

HKIB Beijing Representative Office

8/F, Tower 5, Courtyard 1, Yuetan South Street, Xicheng District, Beijing, China 100045
T: (86) 10-6657 5550 F: (86) 10-6657 4966 E-mail: hkib-beijing@hkib.org

The background of the page is a soft, out-of-focus photograph of a chessboard. Several chess pieces, including a knight, a king, and a queen, are visible, though their details are obscured by the blur. The lighting is warm and diffused, creating a gentle, elegant atmosphere.

AWARDS PRESENTATION & GALA DINNER
22 FEBRUARY 2019