



The **14<sup>th</sup>** **HKIB**  
**Outstanding**  
**Financial Management Planner**  
**AWARDS**

**AWARDS**  
**PRESENTATION**

Organisers:



香港銀行學會  
The Hong Kong Institute of Bankers

**CT**goodjobs  
Powered by Career Times



Organisers:



香港銀行學會  
The Hong Kong Institute of Bankers

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# Content

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- 02 About the Awards
- 02 Categories & Eligibility
- 03 Congratulatory Messages
  - Message from Mr Christopher HUI, 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 Laurence LI, SC  
*Chairman, Financial Services Development Council*
  - Message from Mr Peter WONG, GBS, JP, Hon. Fellow (IHKM)  
*President, Council, The Hong Kong Institute of Bankers*
  - Message from Dr Patrick FUNG, JP, Hon. Fellow (HKIB)  
*Chairman, Executive Committee, The Hong Kong Institute of Bankers*
  - Message from Prof Kalok CHAN  
*Chairman, Organising Committee*  
*The 14th HKIB Outstanding Financial Management Planner Awards*
- 09 Panel of Judges - Final Round
- 11 Panel of Judges - Round 2
- 13 Organising Committee
- 15 Winners of Top Nomination Award
- 16 Winners of Grand Award
- 18 Winners of Gold Award
- 21 Winners of Silver Award
- 23 Winners of Bronze Award
- 25 Winners of Certificate of Merit
- 31 Event Highlights
- 38 Acknowledgement
- 39 About the Organisers
- 40 Past Events Photos

# About the Awards

Now in its fourteenth year, **The Hong Kong Institute of Bankers (HKIB) Outstanding Financial Management Planner (OFMP) Awards** is an annual 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 with investable assets of **over USD 1 million** (excluding the primary residence owned)

# Message From

**Mr Christopher HUI, JP**

*Secretary for Financial Services and the Treasury*

*HKSAR Government*



力臻卓越  
範領同儕

香港銀行學會第十四屆傑出財富管理師大獎頒獎典禮

財經事務及庫務局局長許正宇



# Message From

**Dr CHAN Sau San, Ph.D.**

*Chairman of the Board of Directors  
Monetary Authority of Macao*



Against a backdrop of increased financial-market volatilities worldwide driven by the COVID-19 pandemic, escalating geopolitical tensions, and expectations of imminent monetary policy tightening by major central banks, long-term financial planning has become prominent yet challenging. While the implementation of advantageous policies in the Greater Bay Area, such as the Cross-boundary Wealth Management Connect Scheme, would generate business opportunities, it underscores the need for innovative strategies to meet different varieties of investment purposes.

The OFMP Awards programme provides a unique platform for practitioners to share working experiences and refresh professional knowledge. It also advocates best practice standards which help engender public confidence in financial planning and management services. The Awards, in particular, stand for tokens of excellent performance in the profession.

My heartfelt congratulations to winners of the 14th HKIB OFMP Awards and I wish them every success in their career development.

A stylized, handwritten signature in black ink, consisting of a large, sweeping initial 'C' followed by a smaller, more intricate flourish.

**CHAN Sau San, Ph.D.**  
Chairman of the Board of Directors  
Monetary Authority of Macao

# Message From

**Mr Laurence LI, SC**

*Chairman*

*Financial Services Development Council*



Congratulations to all the winners of the 14th Outstanding Financial Management Planner Awards. Talent plays a pivotal role in maintaining the status of Hong Kong as an international financial centre. The HKIB Awards has been providing an incredible opportunity for talented financial planning and wealth management practitioners to enhance their competitive edge in the market. I am impressed by your expertise, excellence and dedication demonstrated through this program.

Thank you HKIB, for organising this remarkable awards program. We look forward to continuously developing our talent pool in Hong Kong together.

**Laurence LI, SC**

*Chairman*

*Financial Services Development Council*

# Message From

**Mr Peter T S WONG, GBS, JP, Hon. Fellow (HKIB)**

*President, Council*

*The Hong Kong Institute of Bankers*



As Asia becomes more prosperous, professional high-quality wealth management is going to become more important. The industry's ability to invest wealth to fund Asia's next phase of growth will be a foundation stone of a better future for all of us. Hong Kong's depth of talent, its position at the heart of the world's most dynamic region, and its global connections make it a natural leader in the wealth management industry.

Hong Kong's ability to deliver the highest standard of professional competence is key in making us stand out. I would like to extend my congratulations to all the winners of the 14th HKIB Outstanding Financial Management Planner Awards. They have all made exceptional contributions to positioning Hong Kong at the cutting edge of innovation and industry best practice. I wish them all well in their future endeavours as they continue to contribute to an important and flourishing sector.

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

**Peter T S WONG, GBS, JP, Hon. Fellow (HKIB)**

*President, Council*

*The Hong Kong Institute of Bankers*



# Message From

**Dr Patrick FUNG, JP, Hon. Fellow (HKIB)**

*Chairman, Executive Committee*

*The Hong Kong Institute of Bankers*



Since its inauguration in 2006, the HKIB Outstanding Financial Management Planner Awards have been a key event for talented wealth management professionals to compete for recognition from an independent industry body. As we celebrate the anniversary 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 14th HKIB Outstanding Financial Management Planner Awards. We appreciate 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, I congratulate the marvelous presentations by all contestants.

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

**Dr Patrick FUNG, JP, Hon. Fellow (HKIB)**

*Chairman, Executive Committee*

*The Hong Kong Institute of Bankers*

# Message From

## Prof Kalok CHAN

*Chairman, Organising Committee*

*The 14th HKIB Outstanding Financial Management Planner Awards*



The winners of the 14th 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 14th HKIB Outstanding Financial Management Planner Awards*

# Panel of Judges

## Final Round: Best of the Best



**NG Chor Chu, Macy**  
Deputy General Manager  
(Branch Management)  
Bank of China (Hong Kong) Limited



**YUNG Kwok Hing, Tommy**  
General Manager  
Bank of Communications (Hong  
Kong) Limited



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



**Prof Kalok CHAN**  
Wei Lun Professor of Finance  
Chinese University of Hong Kong



**HO Wing Kong, Calvin**  
Head of Wealth Management  
Specialists  
Citibank (Hong Kong) Limited



**CHAN Wai Kin, Cliff**  
Executive Director & Group Head of  
Wealth Management Division  
Dah Sing Bank, Limited



**Derek WONG**  
*Fellow Certified Banker*  
Vice Chairman  
Dah Sing Bank, Limited



**HSIEH Belinda Pei-fang**  
Executive Director, Head of  
Treasuries Investment Products and  
Advisory  
DBS Bank (Hong Kong) Limited



**Wendy YEUNG**  
Head of Distribution Network  
Hongkong and Shanghai Banking  
Corporation Limited (The)

*Listed in alphabetical order by organisation name then last name*

# Panel of Judges

## Final Round: Best of the Best



**Yvonne CHAN**

Division Director, New Territories  
Hongkong and Shanghai Banking  
Corporation Limited (The)



**CHOW Kin Hung, Nelson**

Chairman  
Hong Kong Investment Funds  
Association



**Alan AU**

Executive Director (Banking  
Conduct)  
Hong Kong Monetary Authority



**WAN Ho Fung, Jonathan**

Deputy Head of Retail Banking &  
Wealth Management Department  
Industrial and Commercial Bank of  
China (Asia) Limited



**HUI Wai Hing, Peter**

Assistant Chief Executive  
Nanyang Commercial Bank, Limited



**Alexandra YEONG**

Senior 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



**CHEUNG Sze Kei, Amy**  
Senior Team Head (Wealth Strategies)  
Bank of China (Hong Kong)



**KO Yiu Ho, Neville**  
Assistant General Manager  
Bank of China (Hong Kong)



**TAM Sai Hung, Carl**  
Section Head, Project & Network  
Bank of Communications (Hong Kong) Limited



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



**CHAN Miu Ying, Sara**  
General Manager & Head of Private  
Banking, Personal & Business Banking  
China CITIC Bank International  
Limited



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



**CHOI Wai Lam, Winnie**  
Head of Wealth Management  
Citibank (Hong Kong) Limited



**Florence CHEUNG**  
Head of Segment and Product  
Management  
Dah Sing Bank, Limited



**Howie PUN**  
Vice President, Investment  
Consultant - Team Lead  
DBS Bank (Hong Kong) Limited

*Listed in alphabetical order by organisation name then last name*

# Panel of Judges

## Round 2: Closed Door Oral Presentation



**Winson YAU**

Senior Vice President, Investment  
Consulting Head  
DBS Bank (Hong Kong) Limited



**Michelle YAM**

Senior Managing Director, Deputy  
Head of Private Banking  
EFG Bank



**Shannon LAM**

Division Director, Mongkok  
Hongkong and Shanghai Banking  
Corporation Limited (The)



**Vicky YAU**

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



**Wallace LAM**

Head of Salesforce Management  
Hang Seng Bank Limited



**POON Yin Shan, Sandy**

Wealth Management Product Sales  
and Marketing Head  
Industrial and Commercial Bank of  
China



**Helen LI**

Head of Private Banking Business  
Division  
Nanyang Commercial Bank, Limited



**Michael TING**

Head of Investment Product  
Specialists Division  
Nanyang Commercial Bank, Limited

**CHAN Yin Ping, Becky**

Executive Director & Head, West  
Region, Distribution Network  
Standard Chartered Bank (HK)  
Limited

*Listed in alphabetical order by organisation name then last name*

# Organising Committee



## Advisor

**Derek WONG** *Fellow Certified Banker*  
Member, Executive Committee and Chairperson,  
Membership and Professional Development Committee  
The Hong Kong Institute of Bankers  
Vice Chairman  
Dah Sing Bank, Limited



## Chairman

**Prof Kalok CHAN**  
Wei Lun Professor of Finance  
The Chinese University of Hong Kong

## Members

### Joyce AU

Head, Wealth Management Division  
Nanyang Commercial Bank, Limited

### Jacqueline CHAN

Manager WEM Portfolio Management  
Hongkong and Shanghai Banking  
Corporation Limited (The)

### Solute CHAN

Senior Wealth Specialist  
Bank of China (Hong Kong) Limited

### Doris FONG

Manager Academy and People Development  
Hongkong and Shanghai Banking  
Corporation Limited (The)

### Keith HUNG

Wealth Academy Manager  
Hang Seng Bank Limited

### Betty KWOK

Senior Training Manager  
Citibank (Hong Kong) Limited

### Karen KWOK

Assistant Vice President, Investment & Insurance Sales  
Management  
Shanghai Commercial Bank Limited

### Kenny KWONG

Senior Manager, Academy and People Development  
Hongkong and Shanghai Banking Corporation Limited  
(The)

### Andy LSU

Head of Wealth Academy  
Hang Seng Bank Limited

### Alberto SIU

Vice President, Investment Consultant - Team Lead  
DBS Bank (Hong Kong) Limited

*Listed in alphabetical order by organisation name then last name*

# Organising Committee

## Members

### **Kelvin TANG**

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

### **Andy TIU**

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

### **John TSANG**

Vice President, Investment Consultant - Team  
Lead  
DBS Bank (Hong Kong) Limited

### **Kelly TSANG**

Senior Team Head (Wealth Specialists)  
Bank of China (Hong Kong) Limited

### **Alicia WONG**

Manager, Investment Products  
Dah Sing Bank, Limited

### **Dominic WONG**

Investment Consultant, CITIC*diamond*  
China CITIC Bank International Limited

### **WONG, Pak Ling**

District Insurance Specialist  
Citibank (Hong Kong) Limited

### **WONG Wai Lam**

Head of GCB Business Training  
Citibank (Hong Kong) Limited

### **Vincent YIU**

Senior Wealth Specialist  
Bank of China (Hong Kong) Limited

### **Celia YU**

Wealth Academy Manager  
Hang Seng Bank Limited

*Listed in alphabetical order by organisation name then last name*



# Winners of Top Nomination Award



Bank of China (Hong Kong) Limited



China CITIC Bank International Limited



Citibank (Hong Kong) Limited



Dah Sing Bank, Limited



Hang Seng Bank Limited



Hongkong and Shanghai Banking Corporation Limited (The)



Nanyang Commercial Bank, Limited

# Winners of Grand Award

## Group A



### The Bank of East Asia Limited



#### LEUNG Ka Lai, Victor

It is my great privilege to represent Bank of East Asia, Limited (“BEA”) as a participant of the 14th HKIB Outstanding Financial Management Planner Awards. I am flattered by the judges’ acknowledgement and this encouraging result.

Most importantly, I would like to express my deepest appreciation for the nomination and encouragement from my supervisors, including my Department Head, District Head, Branch Manager, Investment Consultants, as well as other teammates. This remarkable result is testament to my commitment to the Bank, and a recognition to my expertise.

Specifically, my utmost gratitude goes to my mentors, who guided and assisted me for every minute of my four-month apprenticeship. This winning result is a response to your efforts.

Every journey begins with a single step. I will carry on after this accomplishment, regard it as a stepping stone, and keep perfecting my skills and enriching my knowledge. Thank you to HKIB for the platform provided and to BEA for its support.

## Group B



### DBS Bank (Hong Kong) Limited



#### LO Chun Chiu

It is my honour to represent DBS to participate in the 14th HKIB Outstanding Financial Management Planner Awards. Being one of the finalists, I would like to take this opportunity to express my deepest gratitude to Ms. Belinda HSIEH and Mr. Winson YAU for the nomination and guidance.

I am so grateful for being a member of the DBS Investment Consultant Team whose insights have inspired me a lot. Without their support and encouragement, this achievement would not have been possible.

Participating in the 14th HKIB Outstanding Financial Management Planner Awards is a milestone in my career. It does not only broaden my horizon but also serves as a great platform to seek new experiences. A big thank you to HKIB for organising this wonderful event in an effort to enhance the industry’s professionalism and ethical standard.

Lastly, my wife Zoe deserves my wholehearted appreciation - her optimism and selfless support motivate me every single day. Thank you.

*Listed in alphabetical order by organisation name then last name*

# Winners of Grand Award

## Group C



### **Bank of China (Hong Kong) Limited**

#### **YIP Wai Ho, Ray**



I am truly humbled and honoured to represent Bank of China (Hong Kong) to participate in the 14th HKIB Outstanding Financial Management Planner Awards. This award is an important milestone achievement for me and this competition is an invaluable experience in my career life.

First of all, I would like to thank HKIB to provide such a great platform for me to communicate with other banking professionals and broaden my professional knowledge in financial planning. Also, I would like to express my deepest gratitude to all my senior management and supporting team from Bank of China (Hong Kong). I could not succeed without them. They have provided tremendous support and encouragement to me throughout the competition. And they also shared their own precious experience in financial planning, particularly on high-net-worth customers, which greatly enhance my professionalism and competency in this competition as well as my career. I hope I could pass on the knowledge and skills that I have gained to my fellow colleagues and future participants in Bank of China (Hong Kong). I will continue to strive for greater contributions to the banking industry in the future.

Last but not least, I would take this opportunity to thank my family, especially my parents and my wife. Their unconditional love and support are always the greatest motivation for me to overcome any challenges in life. It is a great pleasure to share my joy and happiness with them.

# Winners of Gold Award

## Group A



### **Bank of China (Hong Kong) Limited**

#### **CHEUNG Yiu Yuen, Thomas**



It is my great honor and privilege to represent Bank of China (Hong Kong) to participate in the 14th HKIB Outstanding Financial Management Planner Awards. Being one of the finalists, my deepest gratitude goes first and foremost to all top management and support teams in BOCHK, for their continuous encouragement and guidance. They have walked me through all the stages of this written proposal and presentation preparations.

It is definitely a major milestone in my career life, not just strengthened my relevant financial knowledge and expertise, but also made me become more mature to handle difficulties in the face of future adversity.

Last but not least, I would like to express my heartfelt gratitude again for the support from BOCHK top management who unconditionally support me throughout the whole journey. Without their consistent support and insightful instruction, my performance could not reach its present form.

“Whatever is worth doing is worth doing well.” I would like to continue to positively impact people and colleagues around with my enthusiasm and valuable experience in this journey.

## Group A



### **Hongkong and Shanghai Banking Corporation Limited (The)**

#### **LEE Kum Kai, Ronald**



It is my greatest honor and privilege to represent HSBC to participate in the 14th HKIB Outstanding Financial Management Planner Awards. I would like to express my gratitude to the senior management for their unreserved support and guidance throughout the journey. I am exceptionally grateful for the recognition received. It was certainly a one-in-a-lifetime experience which enrich my financial knowledge and broaden my vision in regard to serving high net-worth clients.

This competition has certainly been an important milestone in my banking career. Not only did I learn a lot of practical knowledge on wealth planning, but also enhanced my skillset on presentation, communication and to overcome difficulties throughout the competition. This award would not become reality without dedicated teamwork. I would also like to take this opportunity to thank my family, friends and colleagues who have given me continuous support throughout the competition.

I am a great believer in luck, and I find the harder I work, the more I have of it.

*Listed in alphabetical order by organisation name then last name*

# Winners of Gold Award

## Group B



### China CITIC Bank International Limited



#### CHAN Full Keung, Luis

It is a privilege to represent China CITIC Bank International (the “Bank”) to participate in the 14th HKIB Outstanding Financial Management Planner Awards. I would like to express my heartfelt gratitude to the Bank’s senior management, my supervisor, the training team and branch colleagues.

Their support, encouragement and advice have always been important to me over the course of my career at the Bank and they will continue to be. Their determination for scaling new heights in the profession provides me the necessary fuel for moving forward while teamwork is the key to continuous achievement.

I believe professional growth is a journey that sees no end. Participating in the competition is a major milestone. Amid the myriad challenges, the competition has helped sharpen my financial knowledge, presentation skills and business acumen. It is a great honour to be part of the competition and to be among my fellow contestants. I will continue to deliver quality services to my customers and be part of the engine that raises industry standards.

Last but not least, I would like to thank my wife and my family, who have given me great support during the competition. This will become a memorable event that I will savour for a long time to come.

## Group B



### Dah Sing Bank, Limited



#### WONG Kim Cheung

Representing Dah Sing Bank to participate in the 14th HKIB Outstanding Financial Management Planner Awards is one of my greatest honours. Thank you HKIB and CT goodjobs for organizing this competition, it is a valuable platform to refresh me the importance of financial planning and wealth management, the importance of ethical selling and product suitability for customers, and the importance of two-ways communications between customers and the banker. I need to give special thanks to all the judges for their valuable comments that are extremely useful and adoptable to my further development in the banking industry.

I would like to express my deepest gratitude to our senior management of the Dah Sing Bank for nominating me. I would also like to take this opportunity to thank my family, friends and colleagues, who have given me unconditional support throughout the journey. The OFMP award should be one of my greatest milestone in my career life.

Lastly, I would sincerely invite the market practitioner to join this competition, for the challenges and rewarding experience to be gained from the best of the best in the industry throughout the process.

*Listed in alphabetical order by organisation name then last name*

# Winners of Gold Award

## Group C



### **Dah Sing Bank, Limited**



#### **PUN Kam Man, Kamman**

It is my greatest honour to participate in the 14th HKIB Outstanding Financial Management Planner Awards on behalf of Dah Sing Bank. It is a challenging competition as it requires high intention to details, abilities to understand the needs of customers and broad financial knowledge. I had gained a lot of experience during the competition.

I would wish to express my gratitude to our senior management of Dah Sing Bank for nominating me and giving me unconditional support. Also, thank you HKIB and CTgoodjobs for organizing this competition. It's a once in a life time opportunity not only to enrich my knowledge and technical skills, but also to reignite my passions towards financial planning and wealth management through interaction with the judges and other participants. Special thanks to all the judges for all the valuable comments that are extremely meaningful to my further development in the industry.

If you are a market practitioner who has yet to join this competition, I would sincerely encourage you to join this challenging and rewarding competition as you will gain precious experience throughout the process that is beneficial for your career development in the industry.

## Group C



### **Hongkong and Shanghai Banking Corporation Limited (The)**



#### **CHEUNG Chun King, Sylvia**

It is my great pleasure to represent HSBC to join the 14th HKIB Outstanding Financial Management Planner Awards. It is my distinct honor to be one of the finalists in this comprehensive competition which requires all-rounded financial knowledge to meet the sophisticated needs of the high net worth customer. The journey is short but an unforgettable experience in my life.

Financial planning industry keeps fast growing in the past 20 years in Hong Kong. It is the most fortunate for me to join HSBC, the leader in the banking sector to develop my career in financial planning. The Bank has provided structured trainings which help me develop my professional knowledge and improve my management and communication skills.

I would like to take this opportunity to express my gratitude to my senior management and my colleagues who nurture and support me in my work, provide training and advice for the competition. The award is not only granted to me but to the team.

*Listed in alphabetical order by organisation name then last name*

# Winners of Silver Award



中國銀行(香港)  
BANK OF CHINA (HONG KONG)

**Bank of China (Hong Kong) Limited**

**Group A**



**LAM Nga Man**  
Vivian

**Group B**



**CHU Hon Man**  
Herman

**Group C**



**WEN Jinhui**



**Citibank (Hong Kong) Limited**

**Group C**



**CHIU Chi**  
Chung Eric



**DBS Bank (Hong Kong) Limited**

**Group B**



**HO Ka Yung**

*Listed in alphabetical order by organisation name then last name*

# Winners of Silver Award



**Hang Seng Bank Limited**

## Group A



**LEE Yuen Yu  
Yedda**



**Hongkong and Shanghai Banking Corporation Limited (The)**

## Group B



**WONG Po  
Hang**

## Group C



**YIU Ting Kwan  
Enfield**



**Nanyang Commercial Bank, Limited**

## Group A



**WAI Koon Bon  
Bonny**

*Listed in alphabetical order by organisation name then last name*




# Winners of Bronze Award

 **致富CHIEF** Chief Group Limited

## Group A



**YEUNG Tat Ho**

 **Citibank (Hong Kong) Limited**

## Group A



**SIU Ka Yi Sky**

## Group B



**CHAN Ka Yiu  
Andy**

## Group C



**CHAN Chi Wai  
Calvin**



**CHAN Yee Lan  
Linda**

 **大新銀行**  
DAH SING BANK **Dah Sing Bank, Limited**

## Group A



**LEUNG Wing  
Pan Danny**

## Group B



**LAU Kam Yin  
Alex**

*Listed in alphabetical order by organisation name then last name*

# Winners of Bronze Award



**Hongkong and Shanghai Banking Corporation Limited (The)**

## Group A

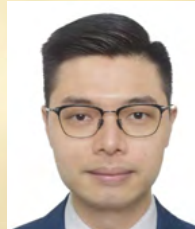


**AU YEUNG  
Chui Ting**

## Group B



**CHEUNG Ka  
Yan**



**LAM Wai Issac**

## Group C



**WONG Ka  
Leung**



**YU Hing Lung  
Michael**

*Listed in alphabetical order by organisation name then last name*

# Winners of Certificate of Merit



中國銀行(香港)  
BANK OF CHINA (HONG KONG)

## Bank of China (Hong Kong) Limited

### Group A



**KWAN Chin Ho  
Jackson**

### Group B



**LAU Chun  
Fung Marco**



**LAU Sze Wan  
Swing**



交通銀行  
BANK OF COMMUNICATION

## Bank of Communication (Hong Kong) Limited

### Group A



**LEE Wai Lun**

### Group B



**FOK Wing Yi**



中信銀行(國際)  
CHINA CITIC BANK INTERNATIONAL



百年同行  
以信致遠  
GROW TOGETHER  
TRUST FOREVER

## China CITIC Bank International Limited

### Group B



**CHENG Hon  
Sing**



**LEE Wai Kit**



**LIAO Ting**



**SUM Sau Yi**

Listed in alphabetical order by organisation name then last name

# Winners of Certificate of Merit



**China CITIC Bank International Limited**

## Group B



**WONG Wai  
Leong**

## Group C



**TANG King Hei**



**Citibank (Hong Kong) Limited**

## Group A



**LAM Sin Tsak  
Jacky**



**LEE Tsz Ting  
Kristy**

## Group B



**WENG Ryan**



**WONG Kai Fung  
Jimmy**



**YIP Chun Kit  
Samuel**

*Listed in alphabetical order by organisation name then last name*

# Winners of Certificate of Merit

## Convoy Financial Services Limited

### Group A



HUEN Tsz Yuk



LI Wing Cheuk

### Group B



CHEN Liujing



LAM Ka Kuen



大新銀行  
DAH SING BANK

## Dah Sing Bank, Limited

### Group C



LAM Ka Yan  
Sandy



恒生銀行  
HANG SENG BANK

## Hang Seng Bank Limited

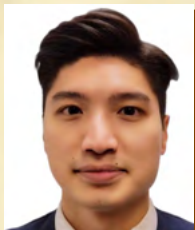
### Group A



CHAN Cho  
Man



CHONG Tsz  
Ling



KWOK Kwong  
Yin



SZETO Wing Yi

*Listed in alphabetical order by organisation name then last name*

# Winners of Certificate of Merit



**Hang Seng Bank Limited**

## Group B



**SIT Ka Ming**



**Hongkong and Shanghai Banking Corporation Limited (The)**

## Group A



**LAM Chun Wai**



**Luso International Banking Limited**

## Group B



**FONG Chi  
Ieong**

*Listed in alphabetical order by organisation name then last name*

# Winners of Certificate of Merit

 **NCB**  
南洋商業銀行 **Nanyang Commercial Bank, Limited**

## Group A



**CHENG Chin  
Pang**



**LEE Kin Lun**



**LEE Pui Lim**



**TAM Wai Yan**



**TSO Kwong  
Keung**

## Group B



**CHEUNG Suet  
Ying**



**CHOW Lee  
Ting**



**HUI Ho Nam**



**LEE Man Kwan**

*Listed in alphabetical order by organisation name then last name*

# Winners of Certificate of Merit



**Shanghai Commercial Bank Limited**

## **Group B**



**YU Kin Kwok**

## **Group C**



**TAM Wing  
Chong Sarah**

*Listed in alphabetical order by organisation name then last name*



# Event Highlights



The honourable guests took a group photo on-stage to record this remarkable moment celebrating the success of the 14th HKIB OFMP Awards Presentation Ceremony (from left to right).

**Ms Shirley PI**, Business Director of CTgoodjobs

**Mr Peter HUI**, Member, Executive Committee, HKIB and Assistant Chief Executive, Nanyang Commercial Bank, Limited

**Mrs Ann KUNG**, Deputy Chief Executive, Bank of China (Hong Kong) Limited

**Mr TONG Hon Shing**, *Fellow Certified Banker*, Member, Executive Committee, HKIB and Deputy Chief Executive and Chief Operating Officer, The Bank of East Asia, Limited

**Mr Felton LAU**, *Hon. Certified Banker*, Vice President, Council, HKIB, Member, Executive Committee, HKIB and Executive Director and Deputy Chief Executive, Chong Hing Bank Limited

**Dr Patrick FUNG**, *JP, Hon. Fellow (HKIB), Hon. Certified Banker*, Vice President, Council, HKIB, Chairman, Executive Committee, HKIB and Chairman, OCBC Wing Hang Bank Limited

**Mr Alan AU**, *JP*, Executive Director (Banking Conduct), Hong Kong Monetary Authority

**Mr Laurence LI**, *SC*, Chairman, Financial Services Development Council

**Mr Harold WONG**, *JP, Hon. Certified Banker*, Vice President, Council, HKIB and Managing Director and Chief Executive, Dah Sing Bank, Limited

**Mr David KWOK**, *Fellow Certified Banker*, Honorary Secretary, Executive Committee, HKIB and Deputy Chairman, Managing Director and Chief Executive, Shanghai Commercial Bank Limited

**Mr Stephen CHAN**, *Certified Banker*, Member, Executive Committee, HKIB and Deputy Chief Executive, Bank of China (Hong Kong) Limited

**Mrs Helen KAN**, Member, Executive Committee, HKIB and Executive Director, Deputy Chief Executive Officer and Head of Personal and Business Banking Group, China CITIC Bank International Limited

**Ms Carmen YIP**, Executive Vice President and Head of Retail Banking Group, Fubon Bank (Hong Kong) Limited

**Ms Carrie LEUNG**, Chief Executive Officer, HKIB

# Event Highlights



**Congratulatory Note Speaker**  
**Dr Patrick FUNG, JP, Hon. Fellow (HKIB),**  
*Hon. Certified Banker*  
Vice President, Council, HKIB,  
Chairman, Executive Committee, HKIB  
and Chairman, OCBC Wing Hang Bank  
Limited



**Keynote Speaker**  
**Mr Christopher HUI, GBS, JP**  
Secretary for Financial Services and the  
Treasury



**Closing Remarks Speaker**  
**Ms Carrie LEUNG**  
Chief Executive Officer, HKIB

# Event Highlights

## Winners of Top Nomination Awards

Presenter:

Mr Laurence LI, SC

Chairman, Financial Services Development Council



**Bank of China (Hong Kong) Limited**  
(Mr Stephen CHAN, *Certified Banker*,  
Deputy Chief Executive receiving the  
award)



**China CITIC Bank International Limited**  
(Ms Anne LEE, Deputy Head of Personal  
and Business Banking Group and Head  
of Sales & Distribution, Personal and  
Business Banking Group receiving the  
award)



**Citibank (Hong Kong) Limited**  
(Ms Winnie CHOI, Head of Wealth  
Management receiving the award)

*Listed in alphabetical order by organisation name*

# Event Highlights

## Winners of Top Nomination Awards

Presenter:

**Mr Laurence LI, SC**

Chairman, Financial Services Development Council



**Dah Sing Bank, Limited**  
(Ms Dessa NG, General Manager, Head of Branches receiving the award)



**Hang Seng Bank Limited**  
(Mr Wallace LAM, Head of RM Distribution Strategy & Planning receiving the award)



**The Hongkong and Shanghai Banking Corporation Limited**  
(Ms Christina TSUI, Head of Jade, Premier and International receiving the award)

*Listed in alphabetical order by organisation name*

# Event Highlights



**Nanyang Commercial Bank, Limited  
(Ms Mandy TANG, Deputy General  
Manager, Personal Relationship Management  
Department receiving the award)**

*Listed in alphabetical order by organisation name*

# Event Highlights

## Winners of Grand Awards

Presenter:

**Mr Alan AU, JP**

Executive Director (Banking Conduct), The Hong Kong Monetary Authority



**Group A - LEUNG Ka Lai, Victor**  
The Bank of East Asia, Limited



**Group B - LO Chun Chiu**  
DBS Bank (Hong Kong) Limited



**Group C - YIP Wai Ho, Ray**  
Bank of China (Hong Kong) Limited

*Listed in alphabetical order by organisation name*

# Event Highlights

## Winners of Gold Awards

Presenter:

Mr Alan AU, JP

Executive Director (Banking Conduct), The Hong Kong Monetary Authority

### Group A



**CHEUNG Yiu Yuen, Thomas**  
Bank of China (Hong Kong) Limited



**LEE Kum Kai, Ronald**  
The Hongkong and Shanghai Banking Corporation Limited

### Group B



**CHAN Full Keung, Luis**  
China CITIC Bank International Limited



**WONG Kim Cheung**  
Dah Sing Bank, Limited

### Group C



**PUN Kam Man, Kamman**  
Dah Sing Bank, Limited  
(Bank representative receiving the award)



**CHEUNG Chun King**  
The Hongkong and Shanghai Banking Corporation Limited

*Listed in alphabetical order by organisation name*

# Acknowledgement

The Hong Kong Institute of Bankers wishes to thank our joint organiser, supporting and participating organisations, judges, moderators and contestants for their genuine efforts and hard work in making the 14th HKIB Outstanding Financial Management Planner Awards a success.

## Supporting Organisations



## Participating Organisations



Listed in alphabetical order by organisation name



# About the Organisers



The Hong Kong Institute of Bankers (HKIB), an industry-recognised professional training and certification body, has been serving the local banking community since 1963.

With the mission to enhance and sustain professionalism in the banking sector, and further develop the territory's status as an international financial centre, HKIB collaborates with banks, regulators, financial institutions, academic institutions and various professional bodies to equip local practitioners with essential banking skills and knowledge through a complete development pathway – from recognised Professional Qualification Programmes (PQP) to Continuing Development Programmes (CDP). In addition to the flagship Certified Banker (CB) programme, which aims to act as the qualifications benchmark for banking professionals, HKIB administers the Enhanced Competency Framework (ECF) programmes, a banking qualifications framework launched by the Hong Kong Monetary Authority (HKMA) with the aim of supporting capacity building and talent development for banking professionals.

In view of the changing landscape of the banking and financial services industry in Hong Kong, Macao and Mainland China, as well as at a global level, the demand for high-standard professional development and mutual recognition of qualifications has grown in importance. HKIB's appointment by the Secretary for Education as an accredited Professional Qualifications Assessment Agency (PQAA), effective 1 August 2020, strengthens the Institute's ability to enhance the banking profession by promoting a common qualifications benchmark and establishing professional autonomy. HKIB is authorised to issue professional qualifications up to Level 6 of the Hong Kong Qualifications Framework (HKQF), which is equivalent to a master's degree.



CTgoodjobs is a leading jobs, employment and recruitment portal in Hong Kong. With support from its website ([www.ctgoodjobs.hk](http://www.ctgoodjobs.hk)), mobile app and social media platforms, CTgoodjobs provides the best job matching experience, as well as latest career news and useful tools to both job seekers and recruiters.

To provide the best service, CTgoodjobs is continuously enhancing its functionality and UX interface. CTgoodjobs supports job seekers with full range of free career resources and tools, including SalaryCheck, CareerMove, CT-Learning, etc. To cater for a diverse range of target audience, CTgoodjobs has strong social media presence with over 330,000 Facebook fans.

# Past Events Photos



# Past Events Photos



# Past Events Photos







**AWARDS PRESENTATION**