



The 15th HKIB Outstanding Financial Management Planner Awards

AWARDS PRESENTATION



Organisers:



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Chairman of the Board of Directors, Monetary Authority of Macao
 - Message from Dr Peter T S WONG, GBS, JP, Hon. Fellow (HKIB), Hon. Certified Banker
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About the Awards

Now in its fifteenth edition, **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

Christopher HUI, GBS, JP

Secretary for Financial Services and the Treasury

HKSAR Government



才專識卓
績著譽隆

香港銀行學會第十五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



Heightened volatilities coupled with major corrections in financial markets have put the world to the test, posing severe challenges for asset management and investment return. While the relaxation of entry restrictions worldwide have brightened up economic outlook, geopolitical fragmentation and tightened monetary-policy stance would weigh on global recovery. Amid the rapid-changing investment landscape due to evolution of financial technology, climate change and regional integration, innovative tactics and swift adaptation are vital in grasping potential business opportunities.

The HKIB OFMP Awards programme goes beyond a symbol of excellence in the profession by offering a unique platform for financial practitioners to share their experience and expertise. It also promotes best practice standards and attitudes in the course of providing top-notch financial services to enhance public confidence in financial planning and wealth management.

Congratulations to winners of the 15th HKIB OFMP Awards. I wish them every success in their career development.

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

CHAN Sau San, *Ph.D.*

Chairman of the Board of Directors

Monetary Authority of Macao

Message From

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

President, Council

The Hong Kong Institute of Bankers



Congratulations to all the winners of the 15th HKIB Outstanding Financial Management Planner Awards. I'm pleased to see that this programme has become an important initiative to strengthen Hong Kong's position as an international financial centre, bringing together the two crucial elements of talent and wealth management.

Talent is the backbone of Hong Kong's success as a global centre and it's no accident that this city has become the indispensable connector between East and West. I strongly believe that we earned this role because our industry practitioners have made Hong Kong a bridge between ideas, between people and between markets.

Since 2006, Asia's total financial wealth has nearly tripled, and now is worth around USD140 trillion. Within Asia, the Greater Bay Area is actually a powerhouse for the development in wealth management, with 450,000 high net-worth families holding aggregated investible assets worth at least RMB2.7 trillion. All these factors imply a huge demand for wealth planners in the near future.

HKIB and the industry as a whole are committed to continuing to enrich Hong Kong's talent pool to meet this future demand. Together, we can help Hong Kong continue to thrive as an international financial hub.

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), Hon. Certified Banker
President, Council
The Hong Kong Institute of Bankers

Message From

Prof Kalok CHAN

Chairman, Organising Committee

The 15th HKIB Outstanding Financial Management Planner Awards



The winners of the 15th HKIB Outstanding Financial Management Planner Awards (OFMP 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.

This year, the HKIB OFMP Awards has entered its' 15th Crystal Anniversary. It is a great honour for me to witness the glorious journey of the OFMP Awards in the past fifteen editions with all the judges, contestants and the HKIB. 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', written in a cursive style.

Prof Kalok CHAN

Chairman, Organising Committee

The 15th HKIB Outstanding Financial Management Planner Awards

Panel of Judges

Final Round: Best of the Best



LEUNG Chun Yip, Bruce

Head of Branch Distribution
& Services Department
Bank of East Asia, Limited (The)



CHAN Miu Ying, Sara

Executive General Manager,
Private Banking
China CITIC Bank International Limited



CHOI Wai Lam, Winnie

Director, Head of Wealth Management
Citibank (Hong Kong) Limited



CHAN Wai Kin, Cliff

Executive Director & Group Head
of Wealth Management Division
Dah Sing Bank, Limited



HSIEH Pei-fang, Belinda

Executive Director, Head of Treasures
Investment Product and Advisory
DBS Bank (Hong Kong) Limited



Michelle YAM

Senior Managing Director
EFG Bank



Vicky YAU

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



Alan AU

Executive Director (Banking Conduct)
Hong Kong Monetary Authority



HUI Wai Hing, Peter

Assistant Chief Executive
Nanyang Commercial Bank, Limited

Listed in alphabetical order by organisation name then last name

Panel of Judges

Final Round: Best of the Best



Fion TSUI
Director, Investment Products
Securities and Futures
Commission



**CHEUNG Ming Fai,
Julian**
Executive Director & Head,
International Region, DN
Standard Chartered Bank
(Hong Kong) Limited



**WONG Wing Hang,
Vivian**
Executive Director, Strategy,
Branch Operations & System
Standard Chartered Bank
(Hong Kong) Limited

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) Limited



KO Yiu Ho, Neville

Chief Wealth Specialist
Bank of China (Hong Kong) Limited



TANG Chak Hong, Kelvin

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



TIU Kin Shing, Andy

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



TANG Cheuk Yin, Vincent

Senior Vice President-
Wealth Sales Management
Branch Distribution & Services Department
Bank of East Asia, Limited (The)



LO Sui Yan, Rex

Managing Director,
Business Development
BEA Union Investment
Management Limited



CHEUNG Man Wah, Poly

General Manager & Head of Branch
Banking, Personal & Business Banking
China CITIC Bank International Limited



HO Wing Kong, Calvin

Head of Wealth Management Specialists
Citibank (Hong Kong) Limited



Jason CHAN

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



Howie PUN

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



Alberto SIU

Vice President,
Investment Product Manager
DBS Bank (Hong Kong) Limited



John TSANG

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



Wallace LAM

Head of Salesforce Management
Hang Seng Bank, Limited



Anthony WONG

Head of Wealth Sales Distribution
Hang Seng Bank, Limited



Kenneth CHAN

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



Lewis YAN

District Manager – Central Division
Hongkong and Shanghai
Banking Corporation Limited (The)



LI Ling, Helen

Head of Private Banking
Business Division
Nanyang Commercial Bank, Limited

Listed in alphabetical order by organisation name then last name

Panel of Judges

Round 2: Closed Door Oral Presentation



Michael TING

Head of Investment Product
Specialists Division
Nanyang Commercial Bank, Limited



Kevin CHU

Executive Director & Head,
Insurance Specialists, WM
Standard Chartered Bank
(Hong Kong) 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

CHOY Tsun Sang, Johnson

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

HUNG Kwan Ching, Quinton

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

KWAN Chun Kit, Alex

Senior Wealth Specialist
Bank of China (Hong Kong) Limited

TANG Chak Hong, Kelvin

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

TIU Kin Shing, Andy

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

MUNG Kenny

Senior Investment Consultant
Bank of East Asia, Limited (The)

YEUNG Cheung Chi, Wilson

Senior Investment Business Manager
Bank of East Asia, Limited (The)

CHEE Chi Man, Chris

Deputy General Manager & Head of Business Development
- Insurance Sales
China CITIC Bank International Limited

LI Bo Wah, Andy

Vice President, People Engagement & Competency Development
China CITIC Bank International Limited

WONG Wa Fung, Dominic

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

Listed in alphabetical order by organisation name then last name

Organising Committee

Members

FUNG Hoi Yan, Yvonne

Senior Training Manager
Citibank (Hong Kong) Limited

LAM Pui Yi, Sylvia

District Insurance Specialist
Citibank (Hong Kong) Limited

WONG Wai Lam

Head of PBWM Business Training
Citibank (Hong Kong) Limited

Frankie HO

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

Nicky YUEN

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

NG Kwan Kit, Kit

Wealth Academy Manager
Hang Seng Bank, Limited

TSENG Wai Kuen, Zoie

Wealth Academy Manager
Hang Seng Bank, Limited

YU Pui Yan, Celia

Wealth Academy Manager
Hang Seng Bank, Limited

Jacqueline CHAN

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

Doris FONG

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

Eunice LAU

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

CHENG Man Kit

Senior Investment Product Specialist
Nanyang Commercial Bank, Limited

KWOK Lok Lam, Karen

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

KO Fai, Patrick

Director, Principal Investment Advisor, WM
Standard Chartered Bank (Hong Kong) Limited

Listed in alphabetical order by organisation name then last name

Winners of the 15th Anniversary Commemorative Award



Bank of China (Hong Kong) Limited



China CITIC Bank International Limited



Citibank (Hong Kong) Limited



Dah Sing Bank, Limited



Nanyang Commercial Bank, Limited



Shanghai Commercial Bank Limited



Hongkong and Shanghai Banking
Corporation Limited (The)

Listed in alphabetical order by organisation name then last name

Winners of Top Nominations 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



Standard Chartered Bank (Hong Kong) Limited

Winners of Grand Award

Group C



Dah Sing Bank, Limited



LEE Hui To

Representing Dah Sing Bank to participate in the 15th HKIB Outstanding Financial Management Planner Awards is one of my greatest honours. Thank you the HKIB and CT goodjobs for organizing this competition, it is a valuable platform to refresh myself on 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 a 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. 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 B



Hang Seng Bank, Limited



WU Kwok Sing

It is my greatest honor and privilege to represent Hang Seng Bank to participate in the 15th HKIB Outstanding Financial Management Planner Awards. Being shortlisted as finalist in the comprehensive competition, it is a great recognition, important milestone achievement and memorable experience in my career life. Thanks the HKIB for providing this invaluable experience to me.



It has strengthened my financial knowledge, professionalism, presentation skills and business acumen. Taking this opportunity, I would like to express my deepest gratitude and sincere appreciation to the senior management and support team for their unreserved support, close collaboration and continuous encouragement throughout the competition. In addition, I would like to say thank you to my family, friends and colleagues. Without their support, I would not be able to continue this wonderful and challenging journey. The credit goes to everyone who provided support to me.

Align with Hang Seng Bank's culture, "Ever-growing". I believed that professional growth is a journey that has no end. I will keep enrich my financial knowledge, uplift my service quality, do my best to grow with my bank and breakthrough any impossibilities in the future!

Listed in alphabetical order by organisation name then last name

Winners of Grand Award

Group A



HSBC

Hongkong and Shanghai Banking Corporation Limited (The)

GONG Chenglin, Lynn



It is a great honor to represent HSBC to participate in the 15th HKIB Outstanding Financial Management Planner Awards. I am also very grateful to the bank's management for having a diverse and innovative mindset, and gave me the utmost trust to compete in Mandarin.

I am very thankful to the HKIB for organizing such a professional competition platform to give bankers the chance to experience the high standards of wealth management services and flourishing development in Hong Kong.

Most importantly, I would like to express my gratitude to my bank and top management, head of my department, and training team for their tremendous support. It is a combination of their trust and all-round guidance that helped me achieve what I have today. With this honor, I will continue to strive for greater contributions to the banking industry in the future, and hope to inspire colleagues from different regions and backgrounds working in Hong Kong.

Finally, I would like to take this opportunity to thank my family and friends from Shanghai for their remote support and assistance, which has given me great motivation to overcome all challenges. This honor belongs to them as well.



Scan to watch
the journey video

Listed in alphabetical order by organisation name then last name

Winners of Gold Award

Group C



HSBC Hongkong and Shanghai Banking Corporation Limited (The)



LAM Chun Wai, Matthew

I am truly honoured to represent HSBC to participate in the 15th HKIB Outstanding Financial Management Planner Awards. The most important, I would like to express my heartfelt gratitude to senior management for the nomination and encouragement and thanks to the support team for their continuous guidance. They have provided unreserved support to me and shared their successful stories in financial planning industry, which is enhancing my professionalism. Besides, I would like to thank the judges for their valuable comments, which equip me to develop further in my banking career. I am very grateful for the recognition. This is an important milestone in my career. I hope to continue to shine in the banking industry in the future.



Scan to watch
the journey video

Thank you the HKIB for organizing the wonderful competition. This event can continue to promote the banking industry's professionalism and positive impact on the industry. I would share my successful experience and invite industry peers to join the wonderful event for challenges and excellent experiences. They definitely benefit a lot from the competition.

Last but not least, I would like to thank my family, especially my wife who gives me great support and encouragement. I will continue to bring positive energy to those around me and success together.

Group C



HSBC Hongkong and Shanghai Banking Corporation Limited (The)



YEUNG Ming Ngai

It is my greatest honor to represent HSBC to participate in the 15th HKIB Outstanding Financial Management Planner Awards. Participating in this competition is an invaluable and unforgettable experience, and definitely a milestone in my career life.

I would like to take this opportunity to thank the HKIB for organizing this competition, providing us with a platform to exchange with other professionals and enhance our own professionalism in the banking sector. Also, I want to give my special thanks to all the judges for their valuable comments, it truly means a lot to me.



Scan to watch
the journey video

I would like to express my deepest gratitude to all top management and the support teams for their guidance, continuous encouragement and tremendous support. I am very fortunate to be part of HSBC, working under such supportive environment has allowed me to grow as an individual. I wish I could share the knowledge and experience I have gained to my fellow colleagues and coming contestants in HSBC. Lastly, I want to thank my family who motivates and support throughout the competition and my life. Once again, thank you everyone that have guided and helped me along the journey, I could not succeed without the unconditionally and consistent support from you all.

Listed in alphabetical order by organisation name then last name

Winners of Gold Award

Group B

DBS Bank (Hong Kong) Limited



CHAN Chun Hong

It is my greatest honour to represent DBS to participate in the 15th HKIB Outstanding Financial Management Planner Awards. It is a challenging competition which requires all-round financial knowledge to fulfil customers' needs. Thus, the award is an important milestone achievement in my career life.

First of all, I would like to express my deepest gratitude to Ms. Belinda HSIEH and Mr. John TSANG for the nomination and guidance. It is my pleasure to be a member of the DBS Investment Consultant Team. They have provided great support and encouragement to me in the competition. Also, they have shared their own precious experience in financial planning. It is not possible to achieve any award without them.

Secondly, thank you the HKIB for organising a wonderful event to enhance the professionalism of our industry. Participating in the competition has broadened my professional knowledge of financial planning.

Last but not least, I would like to thank my wife, Josephine. Her optimism and selfless support are my greatest motivation to overcome challenges in my life.



Group B

DBS Bank (Hong Kong) Limited



LAU Wai Yan

It is a great honour to represent DBS at the 15th HKIB Outstanding Financial Management Planner Awards and become one of the three finalists. Taking part in the contest is a major milestone in my career, as it has definitely broadened my horizon and strengthened my mind and will.

A keen competition with top talents is challenging but also an opportunity to improve and enhance myself after all.

I would like to express my deepest gratitude to the senior management, especially Ms. Belinda HSIEH and Mr. John TSANG, for nominating me to embark on this wonderful journey. Also, I would like to give a special thanks to the DBS Investment Consultant Team for all the encouragement, training and precious advice. Above all, I have to mention my family who give me unconditional support throughout the journey.

Last but not least, I have to give my heartfelt appreciation to the HKIB for providing such a wonderful platform. I am sure that every contestant has their financial planning skills upgraded and hence the integrity of the whole industry is upheld. May all contestants pass the baton and I sincerely wish all future contestants the best of luck!



Listed in alphabetical order by organisation name then last name

Winners of Gold Award

Group A

citi **Citibank (Hong Kong) Limited**



KO Hin Ching, Justin

It has been an honor to represent Citibank to participate in the 15th HKIB Outstanding Financial Management Planner Awards. First, I would like to take this opportunity to express my deepest gratitude to Ms. Hazel CHONG for the nomination, so that I can be part of this epic journey. None of this could have happened without the support of our training team as well as the guidance from our top management. In Citi we do play as a team instead of individual, this competition further proves the statement. Winning this award is indeed a milestone in my career. The experience, the knowledge, I am sure that will not be forgotten for the rest of my life. I would also like to thank the HKIB for organizing this event, gathering professionals to prove the high standard of our banking industry. Part of the journey is the end; I believe the best is yet to come and I will be well-equipped for it.



Scan to watch
the journey video

Group C

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



YAU Sui Lon, Nathan

It is my greatest honor and privilege to represent HSBC to participate in the 15th 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 enriched my financial knowledge and broadened my vision in regard to serving high net-worth clients.

Along my way for completing this competition, not only have I improved my presentation skills and problem-solving skills, I also learned how to step in customer's shoes to plan what is best for them while using a lot of practical knowledge on wealth planning. This award would not become reality without dedicated teamwork. This competition has certainly been an important milestone in my banking career. I would like to take this opportunity to thank my family, friends and colleagues who have given me continuous support throughout the competition.

I believe that wealth-planning knowledge is infinite like a boundless ocean, only through diligence in studies can one make accomplishments.



Scan to watch
the journey video

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 C



**HO Ka Ho,
Alvin**



Citibank (Hong Kong) Limited

Group A



**CHAN Tan Ho,
Dan**



**FUNG Kin Wing,
Angus**

Group B



**SHING Kwan
Wing**

Group C



**CHAN Shu Chun,
Raymond**



大新銀行
DAH SING BANK

Dah Sing Bank, Limited

Group A



**CHENG Shing
To, Ben**

Listed in alphabetical order by organisation name then last name

Winners of Silver Award



Hang Seng Bank, Limited

Group C



MAK Yuen Ting



Hongkong and Shanghai Banking Corporation Limited (The)

Group B



TSOI Wei Wei



WONG On Kin

Listed in alphabetical order by organisation name then last name

Winners of Bronze Award



Bank of China (Hong Kong) Limited

Group A



**CHEUNG Chui
Ting, Carmen**



**LEUNG Shek
Hin, Tony**

Group B



**CHAN Chi
Hing, Dave**



**WONG Sum
Sum, Judy**

Group C



**LAM Ka Yiu,
Geoffrey**



Bank of Communications (Hong Kong) Limited

Group B



WONG Chi Yuen

Listed in alphabetical order by organisation name then last name

Winners of Bronze Award



China CITIC Bank International Limited

Group C



CHO Kelvin



HSBC

Hongkong and Shanghai Banking Corporation Limited (The)

Group A



MO Yik Man



SUNG Siu Hin

Group C



LIN Ka Chun



TONG Ki Sum



Standard Chartered Bank (Hong Kong) Limited

Group B



WONG Pak Lun

Listed in alphabetical order by organisation name then last name

Winners of Certificate of Merit



Bank of China (Hong Kong) Limited

Group A



**NG Hing Lun,
David**



Bank of Communications (Hong Kong) Limited

Group B



**LAW Kwok Wai,
Arthur**



Bank of East Asia, Limited (The)

Group A



**LUI Hin Yu,
Chris**

Listed in alphabetical order by organisation name then last name

Winners of Certificate of Merit



China CITIC Bank International Limited

Group B



LIN Kai Leung,
Alex

Group C



NG Sui Wing,
Steven



Citibank (Hong Kong) Limited

Group B



HO Wing Yin,
Jessica



Dah Sing Bank, Limited

Group A



LAM Hung Kit

Group B



HO Pak Hei,
Daniel

Group C



LAM Hei Yin,
Raymond

Listed in alphabetical order by organisation name then last name

Winners of Certificate of Merit



Hang Seng Bank, Limited

Group A



LIU Sheung Yu



YIU Ping Him

Group B



**HO Lok Ken,
Kent**



WONG Chun Yin



HSBC

Hongkong and Shanghai Banking Corporation Limited (The)

Group A



CHAN Steve

Group B



MA Wing Sum



TANG Ho Nam



NCB 南洋商業銀行

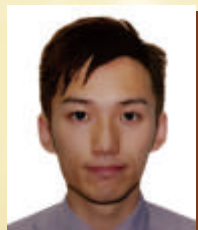
Nanyang Commercial Bank, Limited

Group A



LUI Chung Him

Group B



**CHAN Ka Hin,
Victor**



**KWOK Bik Yu,
Briscilla**

Listed in alphabetical order by organisation name then last name

Winners of Certificate of Merit



Standard Chartered Bank (Hong Kong) Limited

Group B



**LEUNG Ming Lun,
Mark**

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 15th HKIB OFMP Awards Presentation Ceremony (from left to right).

Shirley PI, Business Director of CTgoodjobs

Helen KAN, Member, Executive Committee, The HKIB and Executive Director, Deputy CEO (ACE) and Head of Personal and Business Banking Group, China CITIC Bank International Limited

Peter HUI, *Hon. Certified Banker*, Member, Executive Committee, The HKIB and Assistant Chief Executive, Nanyang Commercial Bank, Limited

Derek WONG, *Fellow Certified Banker*, Member, Executive Committee, The HKIB and Vice Chairman, Dah Sing Bank, Limited

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

Christopher HUI, *GBS, JP*, Secretary for Financial Services and the Treasury, HKSAR Government

Arthur YUEN, *JP, FHKIB, Hon. Certified Banker*, Chairman, Executive Committee, The HKIB and Deputy Chief Executive, Hong Kong Monetary Authority

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

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

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

Carmen YIP, EVP and Head of Retail Banking Group, Fubon Bank (Hong Kong) Limited

Carrie LEUNG, Chief Executive Officer, The HKIB

Event Highlights



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



Closing Remarks Speaker
Carrie LEUNG
Chief Executive Officer, The HKIB



Panel Discussion – Retrospect and Prospect: the journey of the OFMP Awards (from left to right)
Carrie LEUNG, Chief Executive Officer, The HKIB
Prof Kalok CHAN, Wei Lun Professor of Finance, The Chinese University of Hong Kong
Peter HUI, *Hon. Certified Banker*, Member, Executive Committee, The HKIB and Assistant Chief Executive, Nanyang Commercial Bank, Limited
Vivian WONG, Executive Director, Strategy, Branch Operations & System, Standard Chartered Bank (Hong Kong) Limited
Carmen MAK, Vice President & Branch Manager, China CITIC Bank International Limited
Ken LO, Vice President, Team Lead, Investment Consultant, Treasures Investment Products and Advisory, Consumer Banking Group and Wealth Management, DBS Bank (Hong Kong) Limited

Event Highlights

Winners of 15th Anniversary Commemorative Award

Presenter:

Arthur YUEN, JP, FHKIB, Hon. Certified Banker

Chairman, Executive Committee, The HKIB and Deputy Chief Executive,
Hong Kong Monetary Authority



Bank of China (Hong Kong) Limited
(**Arnold CHOW**, Deputy General Manager
(Investment & Insurance),
Personal Digital Banking Products
Department receiving the award)



China CITIC Bank International Limited
(**Stella CHOW**, Assistant General Manager
and Head of People Engagement and
Competency Development receiving the award)



Citibank (Hong Kong) Limited
(**Calvin HO**, Head of Wealth
Management Specialists receiving the award)



Dah Sing Bank, Limited
(**Charmaine LO**, General Manager,
Head of Branches receiving the award)

Listed in alphabetical order by organisation name

Event Highlights



Hongkong and Shanghai Banking Corporation Limited (The)
(Yvonne CHAN, Co-Head of Retail Distribution Kowloon and New Territories receiving the award)



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



Shanghai Commercial Bank Limited
(Clara FUNG, Chief of Human Resources receiving the award)

Listed in alphabetical order by organisation name

Event Highlights

Winners of Top Nominations Award

Presenter:

Prof Kalok CHAN

Wei Lun Professor of Finance, The Chinese University of Hong Kong



Bank of China (Hong Kong) Limited
(**Arnold CHOW**, Deputy General Manager
(Investment & Insurance),
Personal Digital Banking Products
Department receiving the award)



China CITIC Bank International Limited
(**Sara CHAN**, Head of Private Banking,
Personal and Business Banking
receiving the award)



Citibank (Hong Kong) Limited
(**Calvin HO**, Head of Wealth
Management Specialists receiving
the award)



Dah Sing Bank, Limited
(**Charmaine LO**, General Manager,
Head of Branches receiving the award)

Listed in alphabetical order by organisation name

Event Highlights



Hang Seng Bank, Limited
(**Theodore MAK**, Head of Retail Distribution receiving the award)



Hongkong and Shanghai Banking Corporation Limited (The)
(**Yvonne CHAN**, Co-Head of Retail Distribution Kowloon and New Territories receiving the award)



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



Standard Chartered Bank (Hong Kong) Limited
(**WONG Pak Ling**, Head, Wealth Advisory receiving the award)

Listed in alphabetical order by organisation name

Event Highlights

Winners of Grand Award

Presenter:

Christopher HUI, *GBS, JP*

Secretary for Financial Services and the Treasury, HKSAR Government



Group C - LEE Hui To
Dah Sing Bank, Limited



Group B - WU Kwok Sing
Hang Seng Bank, Limited



Group A - GONG Chenglin, Lynn
Hongkong and Shanghai Banking
Corporation Limited (The)

Event Highlights

Winners of Gold Award

Presenter:

Christopher HUI, *GBS, JP*

Secretary for Financial Services and the Treasury, HKSAR Government

Group C



LAM Chun Wai Matthew
Hongkong and Shanghai Banking
Corporation Limited (The)



YEUNG Ming Ngai
Hongkong and Shanghai Banking
Corporation Limited (The)

Group B



CHAN Chun Hong
DBS Bank (Hong Kong) Limited



LAU Wai Yan
DBS Bank (Hong Kong) Limited

Group A



KO Hin Ching Justin
Citibank (Hong Kong) Limited



YAU Sui Lon Nathan
Hongkong and Shanghai Banking
Corporation Limited (The)

Listed in alphabetical order by organisation name then last name

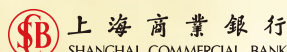
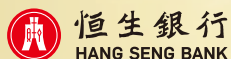
Acknowledgement

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 15th 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, the HKIB collaborates with banks, regulators, financial institutions, academic institutes 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, the 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. The 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. The HKIB is authorised to use professional qualifications up to Level 6 of the Hong Kong Qualifications Framework (HKQF), which is equivalent to a master's degree.



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Past Events Photos



Past Events Photos



Past Events Photos





AWARDS PRESENTATION