

The 16th HKIB Outstanding Financial Management Planner

Awards



Organisers:





Content

02	About the Awards
02	Categories & Eligibility
03	Congratulatory Messages
	Message from Christopher HUI, GBS, 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 Dr Peter T S WONG, GBS, JP, Hon. Fellow (HKIB), FHKIB, Hon. Certified Banker President, Council, The Hong Kong Institute of Bankers
06	Panel of Judges - Final Round
08	Panel of Judges - Round 2
10	Organising Committee
12	Winners of Top Nominations Award
13	Winners of Grand/Gold Award
18	Winners of Silver Award
20	Winners of Bronze Award
23	Winners of Certificate of Merit
27	Acknowledgement
28	About the Organisers
29	Past Events Photos

About the Awards

Now in its sixteenth 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



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富猷

惠、樹

羣 範

財經事務及庫務局局長許正字

正許

香港銀行學會第十六屆傑出財富管理師大獎頒獎典禮

Message From

Dr CHAN Sau San, Ph.D.

Chairman of the Board of Directors Monetary Authority of Macao



Macroeconomic divergence has set in motion the desynchronisation of global monetary policy, which could exacerbate capital-flow volatility and conceivably a repricing of risky assets in financial markets. While different economies are facing challenges associated with their specific position in the business cycle, the interplay of geopolitical fragmentation and structural trends such as technology and climate transitions also calls for cautious diversification in portfolio management. Against this backdrop,

flexible and agile financial strategies would be critical to building resilience while unlocking opportunities in the era of digital innovation and green transformation.

The HKIB OFMP Awards programme provides an exemplary platform to cultivate financial talents and allow practitioners to share their experience and expertise. It also advocates the best practice standards and sustained professionalism, with the aim to enhance public confidence in financial planning and wealth management. The Awards, in particular, stand for a symbol of excellence in the profession.

Congratulations to winners of the 16th HKIB OFMP Awards. I wish them every success in their career development.

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), FHKIB,

Hon. Certified Banker

President, Council
The Hong Kong Institute of Bankers



Congratulations to all the winners and participants of the 16th Hong Kong Institute of Bankers (HKIB) Outstanding Financial Management Planner Awards. I would like to express my appreciation to each contestant for their tremendous competitive efforts.

As a leading international financial center in Asia, Hong Kong boasts a wide array of financial institutions and professional service providers, housing a comprehensive wealth management ecosystem. However, to maintain and enhance Hong Kong's competitiveness, we must remain agile and proactively adapt to

market changes.

The cultivation of a talented workforce is an indispensable attribute for Hong Kong's future success. We must meet the evolving needs of the industry in fintech, sustainable finance, and cross-border trade and investment, and that means constantly cultivating Hong Kong's financial talent pool.

As of 2022, the Asia Pacific region accounted for approximately 42 per cent, or USD218 trillion, of the world's total wealth. Since 2000, global net worth has soared by USD360 trillion, with USD165 trillion of that growth occurring in the Asia-Pacific region. Looking ahead, the Greater Bay Area, next-generation industries, and family offices will continue to drive demand for financial planning services.

I am confident that together, we can strengthen and expand our capabilities to further elevate Hong Kong as a premier international financial center.

Philips

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

The Hong Kong Institute of Bankers

Final Round: Best of the Best



NG Chor Chu, Macy
Deputy General Manager
(Branch Management),
Personal Banking and
Wealth Management Department
Bank of China (Hong Kong) Limited



YUNG Kwok Hing, Tommy
General Manager,
Retail Business Management Department
Bank of Communications
(Hong Kong) Limited



LEUNG Chun Yip, Bruce

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



CHOI Wai Lam, Winnie Investment Advisory Head Citibank (Hong Kong) Limited



CHU Suk Mei, Alice
Deputy Head of Private Banking
& Wealth Management Department
CMB Wing Lung Bank Limited



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



HSIEH Pei-fang, Belinda Managing Director, Head of Treasures Investment Products & Advisory DBS Bank (Hong Kong) Limited



Michelle YAM
Senior Managing Director
EFG Bank



Anthony WONG
Head of Wealth Sales Distribution
Hang Seng Bank Limited

Final Round: Best of the Best



LAM Kin Ho
Assistant Chief Executive
Nayang Commercial Bank, Limited



Trevor LEE
Senior Director of
Investment Products Division
Securities and Futures Commission



WOO Yiu Kan, Ken
Vice President,
Head of Investment &
Insurance Sales Management Department
Shanghai Commercial Bank Limited



CHEUNG Ming Fai,
Julian
Regional Head, International Region,
Distribution Network
Standard Chartered Bank
(Hong Kong) Limited



Vivian

Executive Director,
Strategy and Transformation
Standard Chartered Bank
(Hong Kong) Limited

Round 2: Closed Door Oral Presentation



CHEUNG Sze Kei, Amy Head of Wealth Strategy and Insights Division Bank of China (Hong Kong) Limited



LOKE Wing Kai, Ivan
Head of Investment Portfolio Consultancy
Bank of China (Hong Kong) Limited



TIN Shui Lun, Alan
Business Expert
Bank of Communications
(Hong Kong) Limited



HO Kwok Man, Cyrus Head of Investment Consultant Bank of East Asia, Limited (The)



SIN Ho Ling, Carol

Head of Kowloon Region,
Sales & Distribution
Personal & Business Banking Group
China CITIC Bank International Limited



HO Wing Kong, Calvin Head of Investment Specialists Citibank (Hong Kong) Limited



MA Kin Chung, Tom

District Manager

CMB Wing Lung Bank Limited



NG Yau Chiu, Frederic Senior Vice President, Team Head of Investment Consultant CMB Wing Lung Bank Limited



Florence CHEUNG

Head of Segment and
Product Management
Dah Sing Bank, Limited

Round 2: Closed Door Oral Presentation



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



TSANG Wai Cheung, John
Senior Vice President,
Investment Consultant Head
DBS Bank (Hong Kong) Limited



Winson YAU

Executive Director

Team Head, Product Management - FX,
Fixed Income and Unit Trusts

Treasures Investment Products and Advisory

DBS Bank (Hong Kong) Limited



CHU Ka Lok, Jacky
Executive Vice President
& Head of Acquisition
Hang Seng Bank Limited



LAU Tak Ngai, Andy Head of Wealth Academy Hang Seng Bank Limited



KO Yiu Ho, Neville Chief Investment Strategist Nanyang Commercial Bank, Limited



Michael TING

Head of Investment Product

Specialists Division

Nanyang Commercial Bank, Limited



KWOK Lok Lam, Karen
Assistant Vice President
Investment &
Insurance Sales Management Department
Shanghai Commercial Bank Limited



Director, Team Manager, Insurance Specialist, Wealth Management Standard Chartered Bank (Hong Kong) Limited

Organising Committee

CHOA Ka Lim, Dicky

Senior Investment Portfolio Consultant Bank of China (Hong Kong) Limited

CHOY Tsun Sang, Johnson

Senior Wealth Strategist Bank of China (Hong Kong) Limited

HUNG Kwan Ching, Quinton

Senior Wealth Strategist 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

Kenny MUNG

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

Head of Business Development - Insurance Sales China CITIC Bank International Limited

LI Bo Wah, Andy

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

WONG Wa Fung, Dominic

Investment Consultant, Wealth Management China CITIC Bank International Limited

CHAN Chun Yin, Jimmy

District Treasury Specialist Citibank (Hong Kong) Limited

LAM Pui Yi, Sylvia

District Insurance Specialist Citibank (Hong Kong) Limited

LEE Sek Him, Desmond

District Investment Specialist Citibank (Hong Kong) Limited

AU Hin Chung

Vice President, Investment Consultant, CFP CMB Wing Lung Bank Limited

KWONG Ka Leung

Vice President, Investment Consultant, CFA, FRM, CFP CMB Wing Lung Bank Limited

LAU Chi Hang

Vice President, Investment Consultant, CFP CMB Wing Lung Bank Limited

Frankie HO

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

Ken LO

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

Organising Committee

MOK Siu Kay, Gabriel

Senior Wealth A<mark>cademy Manager</mark> Hang Seng Bank Limited

NG Kwan Kit

Wealth Academy Manager Hang Seng Bank Limited

YU Pui Yan

Wealth Academy Manager Hang Seng Bank Limited

TSANG Kai Kwong

Senior Investment Product Specialist Nanyang Commercial Bank, Limited

LEE Shuk Ching, Denise

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

Winners of Top Nominations Award





Bank of China (Hong Kong) Limited

Citibank (Hong Kong) Limited



CMB Wing Lung Bank Limited



Hang Seng Bank Limited





Nanyang Commercial Bank, Limited

Standard Chartered Bank (Hong Kong) Limited

Group A



Bank of China (Hong Kong) Limited



CHAN Chi Kin, Jan

I am honoured and humbled to be here today as a wealth management manager representing Bank of China (Hong Kong) joining this HKIB event. This journey is fully filled up with my gratitude, and therefore I would like to express my heartfelt appreciation here to my company and superiors for their unwavering support.

First and foremost, I am immensely grateful to my company for providing me with the opportunities and resources to excel in my role. Their trust in my abilities and continuous support are instrumental in my success. I am truly fortunate to be part of this company that fosters growth and encourages its employees to reach their full potential.

I would also like to extend my deepest gratitude to my superiors for their guidance and mentorship throughout my journey. Their wisdom, expertise and unwavering support have shaped me into the professional I am today. Their trust is definitely a constant source of motivation, driving me to strive for excellence.

Lastly, I would like to thank the HKIB for organising this competition providing a platform for professionals in the industry to showcase their skills. Participating in this competition has been a transformative experience, allowing me to learn from the best and grow both personally and professionally.

To me, this award is a testament to the collective efforts of my company, superiors, and myself. I will continue to work diligently to uphold all their trusts to me. Thank you once again for this incredible honor.

Group A



Bank of China (Hong Kong) Limited FU Yi Tat, Aaron



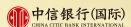
I am thankful to BOCHK for providing me with the opportunity to participate in the 16th HKIB Outstanding Financial Management Planner Awards. It has been an enriching experience that has allowed me to prove my skills and knowledge in wealth management.

Throughout the competition, I have gained valuable insights and learned from the challenges presented. The well-structured training provided by the company also enhanced my professionalism and competitiveness. I am now able to apply the theoretical knowledge I have acquired in my daily works, and even further solidifying my understanding of wealth management principles.

Moving forward, I will continue to apply the skills and expertise I have developed during the competition to my work in the wealth management industry. I am confident that the experience has better equipped me with the appropriate tools to resolve the complexities of various market scenarios and provide customised service to clients.

Once again, I would like to express my gratitude to my company, BOCHK, for their full support and guidance throughout the competition. This opportunity is truly invaluable, and I look forward to leveraging this experience as one of the contributions to success of the wealth management industry in future.

Group C



China CITIC Bank International Limited



WU Hao, Holly

I am honoured for the opportunity to represent China CITIC Bank International (the "bank") in the 16th HKIB Outstanding Financial Management Planner Awards.

Being presented the gold award is a remarkable experience which gives me a great sense of pride. I believe professional growth is a journey that sees no end. Participating in the HKIB OFMP Awards is a major milestone in my professional life. In the face of the myriad challenges, the competition has helped sharpen my financial knowledge, presentation skills and business acumen. I will continue to provide best-in-class service to my customers and be part of the engine that drives industry standards.

I take great pleasure in sharing my achievement and the fruit of the experience with my colleagues as well as the training team who have helped beef up my knowledge and hone my skills, and inspired and encouraged me to pursue my professional goals. This will surely remain one of the greatest moments in my career and I will savour this for a long time to come.

Once again, I am profoundly grateful for the recognition and the unwavering support I have received. I eagerly look forward to continuing my journey in the dynamic field of financial management and making further contributions to the bank and the banking industry.

Group B





DBS Bank (Hong Kong) Limited KUN Ki Lam, Dennis

It is my honour to represent DBS to participate in the 16th HKIB Outstanding Financial Management Planner Awards. Being one of the three finalists, I would like to take this golden opportunity to express my deepest gratitude to Ms Belinda HSIEH and Mr John TSANG for the nomination and guidance.

I am so grateful for being a member of Investment Consultant Team at DBS. The strong bonding among us has driven me to be more proactive and do even better. With their support and encouragement, I have come to realise that impossible is nothing.

Participating in the 16th 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 huge thank you to HKIB for organising this wonderful event in an effort to enhance the industry's professionalism and ethical standard.

Just as importantly, I would like to thank my family, especially my mom. They always stand by me, providing support in overcoming any challenges that come my way. It would be my pleasure to celebrate this joyful moment with them.

Group B





DBS Bank (Hong Kong) Limited YUEN Chi Kwong, Kenneth

It is a great honour for me to represent DBS in the 16th HKIB Outstanding Financial Management Planner Awards. This is a challenging competition that encompasses a wide range of knowledge and various aspects in the financial field. This award is a very meaningful milestone in my life. I am excited to be a part of it, and to be able to improve myself.

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 training, encouragement, and selfless help.

Thank you HKIB for organising the wonderful and amazing event to continue to enhance the professionalism of our industry. Participating in the competition has broadened my knowledge and presentation skills on financial planning.

Last but not least, I would like to thank my beloved wife, Jennifer. Her optimism and unconditional support have been my biggest motivation throughout this journey and help me overcome different challenges in life.

Group C





Hang Seng Bank Limited

CHOI Hiu Fai

It is my greatest honour to represent Hang Seng Bank to participate in the 16th HKIB Outstanding Financial Management Planner Awards, also my immense pleasure to be recognised as one of the finalists in this competition. My deepest gratitude to our senior management for the nomination and support provided, and to HKIB for this precious opportunity.

This competition was indeed a challenging yet rewarding journey which allows my financial planning skills to develop and flourish. My team worked together with me night and day for the competition to overcome all the challenges. Words cannot express how grateful I am for all the unconditional support I received. Their guidance allows me to strive for excellence, pushing me to my full potential. My success would not be possible without my team and I would like to give all credit to them.

This award is surely an important milestone in my career that I would always remember. The knowledge and skills that I have gained in this competition would be utterly valuable in developing my professionalism. I aspire to help more customers build their unique financial plans, while continuing to improve myself in the world of financial planning.

Group C





Hang Seng Bank Limited SZETO Ki Fung

It is the greatest honour and privilege to represent Hang Seng Bank at the 16th HKIB Outstanding Financial Management Planner Awards and become one of the three finalists. This recognition is a significant milestone and a wonderful experience in my career life.

Firstly, I would like to express my heartfelt gratitude to the senior management for the nomination and encouragement, as well as to the support team for their continuous guidance. I also want to thank HKIB for organising this competition, which provides talented individuals with a platform to exchange ideas with other professionals and enhance our professionalism in the banking sector. Additionally, I extend special thanks to all the judges for their valuable comments which are extremely useful and can be applied to my future development in the banking industry.

'EVER-GROWING, EVER-INNOVATING' is one of our Bank's themes for the Bank's 90th anniversary. It always reminds me to act as efficient as possible in the competition and real life, to continuously enriching our financial knowledge, uplifting our service quality, and moving in lockstep with our clients to embrace changes and achieve infinite possibilities together.

Group A



拳 NCB 南洋商業銀行

Nanyang Commercial Bank, Limited



LAW Chi Wah

It is my honour to represent NCB and participate in the 16th HKIB Outstanding Financial Management Planner Awards. This award marks an important milestone in my career, and this competition has provided me with invaluable experiences.

Firstly, I would like to express my gratitude to the HKIB for providing this platform that allows me to communicate with other banking professionals and expand my professional knowledge in financial planning. Additionally, I would like to extend my deepest appreciation to my supervisors, including my department head, district head, branch manager, investment product specialists, and top management. Without their support and encouragement, this achievement would not have been possible. I hope to utilise the knowledge and skills gained from this competition in my future job, and I remain committed to making even greater contributions to the banking industry.

Lastly, I want to take this opportunity to thank my wife. She supports and motivates me every single day, and it brings me great pleasure to share my joy and happiness with her.

Group B





Standard Chartered Bank (Hong Kong) Limited FOK Tsz Hin, Martin

It has been a great honour for me to represent Standard Chartered Bank (Hong Kong) at the 16th HKIB Outstanding Financial Management Planner Awards. I would like to express my sincere gratitude to Mr Kevin CHU for nominating me and giving me the opportunity to be a part of this incredible journey.

I am appreciative of the meticulous training schedule and comprehensive support provided by the company. This has allowed me to enhance my presentation skills through personalised coaching and multiple evaluations, leading to a significant boost in my confidence.

Participating in this competition has taught me the invaluable lesson of not becoming complacent in the rapidly evolving financial market.

Lastly, I would like to express my heartfelt thanks to my family, who have been a constant source of motivation and support throughout the competition and in my life. I am deeply grateful to everyone who has guided and assisted me along this journey. Without your unwavering and consistent support, I would not have been able to achieve success.

Winners of Silver Award



Bank of China (Hong Kong) Limited

Group C



KONG Hoi Chun, Steven



LEUNG Hoi Ting, Iris

Citibank (Hong Kong) Limited

Group C



MAN Hiu Ling, Samantha

大新銀行 DAH SING BANK

Dah Sing Bank, Limited

Group B



CHUNG Wai Ling, Joyce

Winners of Silver Award



恒生銀行 HANG SENG BANK

Hang Seng Bank Limited

Group A



SIN Sai Kit

Group B



CHENG Ka Ho



YU Pak Hin, Bernard



常 NCB 南洋商業銀行

Nanyang Commercial Bank, Limited

Group A



LI Jing



YU Chong Yui

Winners of Bronze Award



Bank of China (Hong Kong) Limited

Group B



SHEK Man Bun, Andy



☆ 交通銀行 (香港)
Bank of Communications (Hong Kong) Limited

Group B



WAN Yik Lam

Citibank (Hong Kong) Limited

Group A



WONG Ka Ming, Chris

Group C



LAU Kin Lam, Peter

Winners of Bronze Award



M 招商永隆銀行 CMB WING LUNG BANK

CMB Wing Lung Bank Limited

Group C



HUANG Sheng Rui



大新銀行 DAH SING BANK

Dah Sing Bank, Limited

Group A



AU Hong Ning, **Elvis**



恒生銀行 HANG SENG BANK

Hang Seng Bank Limited

Group A



YEUNG Lai Shan

Group C



LEE David

Winners of Bronze Award



Group A



YU Lai Man



Shanghai Commercial Bank Limited

Group B



CHEUNG Wai Sum



Bank of China (Hong Kong) Limited

Group A



WONG Ka Man, Carmen

Group B



LEUNG Yue Cin, Cindy

Group C



LUO Yuehua, Rebecca





Bank of Communications (Hong Kong) Limited

Group A



YIP Sze Wai

● BEA東亞銀行

Bank of East Asia, Limited (The)

Group A



CHONG Tsz Long

Group C



CHENG Yiu Wang



Group B



BUT Chun Yu, Ernest



LAM Ching Man, Iris

Citibank (Hong Kong) Limited

Group A



CHOW Ka Kin, Alvin



LAW Eman. Vilena



YUEN Choi Wai. Karen

Group C



CHEUNG Yin Fung, Evan

招商永隆銀行

CMB Wing Lung Bank Limited

Group A



LEE Ka Chun

Group B



WAN Tsz Chun



WONG Yui

Group C



ZHU Kequn, Queena



Dah Sing Bank, Limited

Group B



CHAN Kwun Yin, Kenneth



恒生銀行 HANG SENG BANK

Hang Seng Bank Limited

Group B



HUEN Yuen Ting



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

Group A



LEUNG Man Chi, Joyce



PENG Baoer



Shanghai Commercial Bank Limited

Group A



LAW Chi Kit



Standard Chartered Bank (Hong Kong) Limited

Group A



SIU Man Chung, Boris

Group B



LAW Pui Shan, Audrey



LEE Chun Wai



LEE Yin Man, Kelvin



YU Hoi Kin, Kenny

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 16th HKIB Outstanding Financial Management Planner Awards a success.

Supporting Organisations



HONG KONG MONETARY AUTHORITY 香港金融管理局

















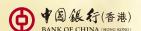






Participating Organisations





























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.



CTgoodjobs is a leading jobs, employment and recruitment portal in Hong Kong. With support from its website (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 SalaryCheek, CareerMove, CT-Learnibg, 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











