



The 18th HKIB Outstanding Financial Management Planner Awards



Organisers:



Content

03 **About the Awards**

03 **Categories & Eligibility**

04 **Congratulatory Messages**

Message from HUI Ching Yu, Christopher, *GBS, JP*

Secretary

Financial Services and the Treasury Bureau

Message from YAN Mei Mei, Salina, *JP*

Permanent Secretary (Financial Services)

Financial Services and the Treasury Bureau

Message from VONG Sin Man, Simon

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 and

Chairman, The Hongkong and Shanghai Banking Corporation Limited

08	Panel of Judges - Final Round
10	Panel of Judges - Round 2
12	Panel of Judges - Round 1
13	Winners of Top Nominations Award
14	Winners of Outstanding Contribution Award
15	Winners of Grand Award
18	Winners of Gold Award
24	Winners of Silver Award
25	Winners of Bronze Award
26	Winners of Certificate of Merit
28	Event Highlight
36	Acknowledgement
37	About the Organisers
38	Past Event Photos

About the Awards

Now in its eighteenth 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 sector
- 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



*For more information,
please scan the QR code.*

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

HUI Ching Yu, Christopher, *GBS, JP*
Secretary
Financial Services and the Treasury Bureau



理財裕眾
立範弘優

第十八屆香港銀行學會
傑出財富管理師大獎頒獎典禮暨晚宴

財經事務及庫務局局長許正宇



Message From

YAN Mei Mei, Salina, JP
Permanent Secretary (Financial Services)
Financial Services and the Treasury Bureau



財經事務及庫務局
常任秘書長(財經事務)甄美薇



策
籌
創
富
惠
港
益
民

第十八屆香港銀行學會
傑出財富管理師大獎頒獎典禮暨晚宴

Message From

VONG Sin Man, Simon

Chairman of the Board of Directors
Monetary Authority of Macao



As we navigate the complexities of the global financial landscape, it is evident that adaptability and innovation are paramount to sustainable development. The continuous shift in economic drivers, geopolitical tensions and technological advancements bring challenges to the traditional paradigms. Against this backdrop, financial planners' agility and foresight will be crucial in seizing opportunities and pursuing development. Appropriate diversification and robust risk management are also essential in ensuring portfolio resilience while achieving positive returns.

The HKIB Outstanding Financial Management Planner Awards provides a unique platform to cultivate financial talents and allows practitioners to exchange views and share expertise. Through implementing various talent initiatives of HKIB, it has nurtured a pool of competent talents supporting the development of the financial ecosystem in the region.

Congratulations to winners of the 18th HKIB OFMP Awards, and I wish them every success in their future endeavours.

Message From

Dr Peter T S WONG, *GBS, JP, Hon. Fellow (HKIB), FHKIB, Hon. Certified Banker*
President, Council, The Hong Kong Institute of Bankers and
Chairman, The Hongkong and Shanghai Banking Corporation Limited



Congratulations to all winners and participants of the 18th HKIB Outstanding Financial Planner Awards. Your achievement highlights the exceptional calibre of professionals who are the foundation of Hong Kong's financial strength.

As a leading international financial centre, Hong Kong's robust ecosystem is driving us toward a historic milestone: projections show we are on track to surpass Switzerland as the world's top wealth management hub by 2028, capitalising on Hong Kong's strategic role as a vital conduit between the Chinese Mainland, Asia, and the global markets. To secure this future, agility and innovation are paramount.

Between 2023 and 2028, global financial wealth is anticipated to increase by an estimated USD92 trillion. According to the Boston Consulting Group, private wealth in Asia is expected to grow at a compound annual rate of 8.2% through 2027 – outpacing all other regions globally. China and India are leading this surge, with the number of millionaires in Asia projected to nearly double by 2027.

Rising average incomes are also reshaping the region's financial profile. The Asian Development Bank reports that the region's middle class has expanded rapidly, with average household incomes in emerging Asian economies increasing by over 50% in the past decade.

This upward mobility is creating a new generation of affluent individuals and families who require sophisticated financial planning to manage, preserve, and grow their wealth. As more individuals accumulate assets, they face increasingly complex decisions around investment diversification, retirement planning, tax optimisation, and legacy management.

The latest insights from the HSBC Affluent Investor Snapshot 2025 reveal 42% of affluent investors are actively diversifying internationally – with Hong Kong as one of the top choices – and deploying capital into alternatives and multi-asset solutions. Yet they face challenges like cost-of-living pressures, macroeconomic volatility, and generational shifts in goals. In this environment, the need for the advanced, trusted planning expertise you provide is greater than ever.

Sustaining our competitiveness requires a dedicated focus on talent in emerging areas like fintech and sustainable finance. Your role is indispensable – not only in managing wealth but in empowering clients' financial security and aspirations.

Your exemplary work fortifies Hong Kong's position and contributes significantly to the region's prosperity. I am confident you will continue to lead with distinction.

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)



YUEN Ka Kui, Garvin

Head of Investment Advisory,
Wealth Management
Citibank (Hong Kong) 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



Winson YAU

Executive Director,
Investment Products Management
DBS Bank (Hong Kong) Limited

Panel of Judges

Final Round: Best of the Best



Gary TAM

Head of Product Advisory
EFG Bank AG Hong Kong Branch



Anthony WONG

Head of Wealth Sales
Distribution Department
Hang Seng Bank Limited



SO Ming Yan, Jason

Co-Head of Private Banking Department
Industrial & Commercial Bank of China (Asia) Limited



LAM Kin Ho, Kenneth

Assistant Chief Executive
Nanyang Commercial Bank, Limited



Andy MA

Associate Director,
Investment Products Division
Securities and Futures Commission

Panel of Judges

Round 2: Closed Door Oral Presentation



CHEUNG Sze Kei, Amy

Head of Wealth Strategy and Insights Division,
Personal Banking Product Department
Bank of China (Hong Kong) Limited



LOKE Wing Kai, Ivan

Head of Investment Portfolio Consultancy,
Personal Banking and Wealth Management Department
Bank of China (Hong Kong) Limited



LAU Ming Yiu, Daniel

Deputy General Manager,
Retail Business Management Department
Bank of Communications
(Hong Kong) Limited



TANG Cheuk Yin, Vincent

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



CHAN Wai Kin, Kevin

Investment Counsellor Head,
Wealth Management,
Personal & Business Banking Group
China CITIC Bank International Limited



CHEE Chi Man, Chris

Head of Business Development -
Insurance Sales, Sales & Distribution,
Personal & Business Banking Group
China CITIC Bank International Limited



HO Wing Kong, Calvin

Head of Investment Specialists,
Wealth Management
Citibank (Hong Kong) Limited



Jason CHAN

Head of Wealth Management Services,
Wealth Management Division
Dah Sing Bank, Limited



PUN Heung Wing, Howie

Senior Vice President, Investment Consultant - Team Lead,
Treasuries Investment Products and Advisory
DBS Bank (Hong Kong) Limited

Panel of Judges

Round 2: Closed Door Oral Presentation



Stanley CHAN

Investment Counsellor
EFG Bank



Alex KWOK

Head of Investment Product Sales,
Wealth Sales Distribution Department
Hang Seng Bank Limited



Irene TSANG

Head of Wealth Academy,
Wealth Sales Distribution Department
Hang Seng Bank Limited



POON Yin Shan, Sandy

Wealth Management Product Sales and
Marketing Section Head, Retail Banking &
Wealth Management Department
Industrial and Commercial Bank of China
(Asia) Limited



WAN Ho Fung, Jonathan

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



CHEUNG Kin Man, Nelson

Former Senior Investment Product Specialist,
Private Banking Centre
Nanyang Commercial Bank, Limited



Michael TING

Head of Investment Product Specialists Division
Nanyang Commercial Bank, Limited



Wilson LI

Senior Manager, Investment Products Division
Securities and Futures Commission



CHEUNG Man Wing, Dewing

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

Panel of Judges

Round 1: Written Financial Plan Assessment

HUI Hiu Wai, Samuel

District Head of Investment Portfolio Consultancy,
Personal Banking and Wealth Management Department
Bank of China (Hong Kong) Limited

HUNG Kwan Ching, Quinton

Senior Wealth Strategist,
Personal Banking Product Department
Bank of China (Hong Kong) Limited

WONG Po Kwan, Jason

Senior Wealth Strategist,
Personal Banking Product Department
Bank of China (Hong Kong) Limited

TANG Chak Hong, Kelvin

Chief Manager, Wealth Management,
Retail Business Management Department
Bank of Communications (Hong Kong) Limited

TIU Kin Shing, Andy

Chief Manager, Wealth Management,
Retail Business Management Department
Bank of Communications (Hong Kong) Limited

Kenny MUNG

Senior Investment Consultant,
Branch Distribution & Services Department
Bank of East Asia, Limited (The)

YEUNG Cheung Chi, Wilson

Senior Investment Business Manager,
Branch Distribution & Services Department
Bank of East Asia, Limited (The)

CHONG Wing Shing, Paul

Team Head, Insurance Sales,
Sales & Distribution, Personal & Business Banking Group
China CITIC Bank International Limited

SO Wai Lun, Given

Investment Consultant,
Wealth Management, Personal & Business Banking Group
China CITIC Bank International Limited

WONG Wa Fung, Dominic

Investment Advisory Specialist,
Wealth Management, Personal & Business Banking Group
China CITIC Bank International Limited

FUNG Yuen Ki, Angel

District Insurance Specialist
Citibank (Hong Kong) Limited

NG Chun Nok, Moses

District Investment Specialist, CG & CPC IC & Adv TH
Citibank (Hong Kong) Limited

SUEN Chi Kin, Eddie

District Investment Specialist, CG & CPC IC & Adv TH
Citibank (Hong Kong) Limited

Dr LAM Yat Fai

Adjunct Professor
City University of Hong Kong

HO Ka Yung, Frankie

Vice President, Investment Consultant - Team Lead,
Treasuries Investment Products and Advisory
DBS Bank (Hong Kong) Limited

LO Chun Chiu, Ken

Senior Vice President, Investment Consultant - Team Lead,
Treasuries Investment Products and Advisory
DBS Bank (Hong Kong) Limited

SO Yee Ching, Candy

Vice President, Investment Consultant - Team Lead,
Treasuries Investment Products and Advisory
DBS Bank (Hong Kong) Limited

Dr LAW Kim Fai, Eric

Associate Programme Leader of Master of Arts
in Personal Finance Education
Education University of Hong Kong (The)

LEUNG Wing Tung, Don

Senior Wealth Coach,
Wealth Sales Distribution Department
Hang Seng Bank Limited

Gabriel MOK

Senior Wealth Academy Manager,
Wealth Sales Distribution Department
Hang Seng Bank Limited

Celia YU

Wealth Academy Manager,
Wealth Sales Distribution Department
Hang Seng Bank Limited

Dr NG Chi Cheong, Allen

Senior Lecturer and Program Director of
Master of Finance / Corporate Finance Program
Hong Kong Polytechnic University (The)

CHAN Tin Lok, Timothy

Global Markets Sales Head
Industrial and Commercial Bank of China (Asia) Limited

CHOI Wai Kit

Investment Products Specialist
Nanyang Commercial Bank, Limited

NG Kai Pan, Clifford

Senior Investment Product Specialist
Nanyang Commercial Bank, Limited

LEUNG Wai Tat, Matthew

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

Winners of Top Nominations Award



Winners of Outstanding Contribution Award



CHEUNG Sze Kei, Amy

Head of Wealth Strategy and Insights Division,
Personal Banking Product Department
Bank of China (Hong Kong) Limited



TANG Chak Hong, Kelvin

Chief Manager, Wealth Management,
Retail Business Management Department
Bank of Communications
(Hong Kong) Limited



TIU Kin Shing, Andy

Chief Manager, Wealth Management,
Retail Business Management Department
Bank of Communications
(Hong Kong) Limited



Kenny MUNG

Senior Investment Consultant,
Branch Distribution & Services Department,
Personal Banking Division
Bank of East Asia, Limited (The)



WONG Wa Fung, Dominic

Investment Advisory Specialist, Wealth Management,
Personal & Business Banking Group
China CITIC Bank International Limited



HO Wing Kong, Calvin

Head of Investment Specialists,
Wealth Management
Citibank (Hong Kong) Limited



Winson YAU

Executive Director,
Investment Products Management
DBS Bank (Hong Kong) Limited



Anthony WONG

Head of Wealth Sales Distribution,
Wealth Sales Distribution Department
Hang Seng Bank Limited



WAN Ho Fung, Jonathan

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



Michael TING

Head of Investment Product Specialists Division
Nanyang Commercial Bank, Limited



KWOK Lok Lam, Karen

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

Winners of Grand Award

Group C



Scan to watch
the journey video



LIU Chun Man, Raymond

China CITIC Bank International Limited

Participating in the 18th HKIB Outstanding Financial Management Planner Awards was an invaluable experience. It challenged me and encouraged me to step out of my comfort zone. Aside from the opportunity to sharpen my technical skills, I have also had a chance to appreciate the importance of teamwork which helps me to embrace challenge as it unfolds and to turn it into opportunities.

I would like to express my gratitude to HKIB, members of the judging panel, members of the training teams particularly colleagues from the investment and insurance departments at China CITIC Bank International for their dedication, guidance, encouragement, and friendship.

Thank you all for making the journey unforgettable and fun.

Winners of Grand Award

Group B



Scan to watch
the journey video



HUNG Hing Kiu, Keith

DBS Bank (Hong Kong) Limited

It is a tremendous honour to represent DBS at the 18th HKIB Outstanding Financial Management Planner Awards and to be named one of the top finalists. Participating in this competition marks a significant milestone in my career, broadening my perspective and strengthening both my mindset and resolve. Competing alongside the industry's top talents was intensely challenging, yet it provided an invaluable opportunity for growth and self-improvement.

I would like to express my deepest gratitude to the senior management – especially Ms Belinda HSIEH – for nominating me for this remarkable journey. My heartfelt thanks also go to the entire DBS Investment Consultant Team for their unwavering encouragement, training, and invaluable guidance.

Above all, I am forever grateful to my beloved wife, Isabella. Her unwavering optimism and unconditional support have been my greatest motivation, helping me overcome every challenge along this journey. Lastly, I sincerely thank HKIB for creating this outstanding platform. Every participant has undoubtedly elevated their financial planning expertise, thereby raising the professional standards of the entire industry. May we all continue to pass the baton, and I wish every future contestant the very best!

Winners of Grand Award

Group A



Scan to watch
the journey video



LAM Sheung Wa, Marco

Bank of Communications (Hong Kong) Limited

It is my great honour to represent Bank of Communications (Hong Kong) Limited to participate in the 18th HKIB Outstanding Financial Management Planner Awards. Being shortlisted as a finalist in this highly competitive competition is not only a recognition but also an encouragement and affirmation to my professional efforts, motivating me to pursue higher standards in wealth management.

I would like to express my sincere gratitude to Bank of Communications (Hong Kong) Limited for nominating me and providing invaluable support. The one-on-one mentoring from professional trainers and rigorous mock drills have significantly enhanced my financial planning capabilities and presentation skills, laying a solid foundation for my performance in the competition.

I also owe this achievement to my amazing team. Their unwavering support and constant encouragement gave me the confidence to overcome challenges throughout the journey.

Looking ahead, I will continue to refine my professional expertise and adhere to the customer-centric philosophy. I am committed to delivering personalised and professional wealth management solutions, helping clients achieve their life financial goals, and creating a win-win situation for both clients and the organisation.

Winners of Gold Award

Group C



Scan to watch
the journey video



CHAN Kwun Sing, James

Hang Seng Bank Limited

It is a tremendous honour to represent Hang Seng Bank at the 18th HKIB Outstanding Financial Management Planner Awards. Being selected as a finalist in this highly competitive competition is both an unexpected affirmation and a significant milestone in my career – an experience I will always value. I am truly grateful to HKIB for this invaluable opportunity.

This journey has enriched my financial knowledge, sharpened my professionalism, enhanced my presentation skills, and strengthened my business acumen. I would like to express my deepest gratitude to the senior management for their unwavering support, patient guidance, and constant encouragement throughout the journey.

I would also like to take this opportunity to thank my family, friends, and colleagues for their continuous support throughout the competition. This recognition belongs not just to me, but to the entire team whose collective effort and support made it possible.

The insights and growth I've gained through this experience will continue to inspire my development. I remain committed to striving for excellence, maintaining the highest standards of professionalism, and delivering outstanding services to our customers.

Winners of Gold Award

Group C



Scan to watch
the journey video



CHUNG Mei Yan, Iris

Bank of China (Hong Kong) Limited

I wish to express my heartfelt gratitude to BOCHK for granting me this once-in-a-lifetime opportunity and for their unwavering support throughout the journey. I am also grateful to HKIB for organising the prestigious Outstanding Financial Management Planner Awards, a platform that encourages self-challenge and perfection as well as mutual learning among contestants.

To my fellow contestants, your passion and collaborative spirit have made this experience truly inspiring. It has been an honour to grow alongside you.

This competition is a transformative milestone in my personal and professional development. It has instilled a customer-centric financial planning mindset, sharpened my ability to present complex ideas with clarity and confidence, and pushed me to think out of the box and step out of my comfort zone. I have become markedly more proactive, sophisticated and resilient, embracing challenges with enthusiasm and courage.

Most importantly, I am committed to bringing these tremendous insights and the best practices back to the Bank, sharing them with colleagues to elevate our wealth management standards and customer service excellence. By doing so, I hope to contribute to the continuous advancement of the banking industry, fostering professionalism and innovation across the sector.

Winners of Gold Award

Group B



Scan to watch
the journey video



TSANG Chi Wai, Kate

China CITIC Bank International Limited

It is an honour to take part in the 18th HKIB Outstanding Financial Management Planner Awards. This recognition underpins wealth management professionals' commitment to placing customers' interests first and building long-term trust through exercising professionalism and integrity.

This achievement would not have been possible without the strong support and teamwork of colleagues across various departments at China CITIC Bank International. It also serves as a reminder for professionals in the field as reliable partners in our customers' wealth journey to keep pace with customers' evolving needs and the transforming market environment.

I will continue to strive for excellence, uphold a high level of integrity and professionalism, discharge my duty, and contribute to the development of the wealth management profession.

Winners of Gold Award

Group B



Scan to watch
the journey video

ICBC  中国工商银行 (亚洲)

CHAU Mun Shing, Mike

Industrial and Commercial Bank of China (Asia) Limited

It is my distinct honour to represent Industrial and Commercial Bank of China (Asia) Limited as a Gold Award winner at the 18th HKIB Outstanding Financial Management Planner Awards. This recognition is a significant milestone in my career and a testament to the dedication and excellence that our team upholds in wealth management.

Participating in this prestigious competition has been an incredibly enriching journey. The rigorous process challenged me to refine my strategic thinking and financial planning skills, while providing a valuable platform to exchange insights with industry experts. This experience has broadened my professional horizons and deepened my commitment to serving clients with integrity and expertise.

I would like to express my heartfelt gratitude to HKIB for organising this meaningful event. My sincere thanks also go to the senior management and my colleagues at Industrial and Commercial Bank of China (Asia) Limited for their unwavering support, guidance, and encouragement throughout this journey. Their mentorship has been instrumental in my development.

This award is not just a personal achievement but a motivation to strive for greater heights. I look forward to continuing my contribution to banking industry, upholding the highest standards of professionalism, and growing alongside my clients and the bank. Thank you for this incredible opportunity!

Winners of Gold Award

Group A



Scan to watch
the journey video



CHAN Ka Yan, Yanica

China CITIC Bank International Limited

I am honoured for the opportunity to represent China CITIC Bank International in the 18th HKIB Outstanding Financial Management Planner Awards. This event provides the participants a unique platform for demonstrating and highlighting the importance of professionalism in the banking industry. It was an invaluable experience and a significant early milestone in my career.

I would like to express my heartfelt gratitude to the management and members of the various support teams who helped gear me up especially for the presentation sessions. Their trust and encouragement empowered me to embrace the challenge and go the extra mile. I am very fortunate to work in such a supportive environment which also gives me support for personal growth. Although this part of the journey has come to an end, I believe the best is yet to come.

Winners of Gold Award

Group A



Scan to watch
the journey video



CHEN Peipei, Emma

Hang Seng Bank Limited

It is my greatest honour to represent Hang Seng Bank to participate in the 18th HKIB Outstanding Financial Management Planner Awards. I would like to express my deepest gratitude to Hang Seng Bank for the nomination and unwavering support, and to HKIB for this invaluable opportunity. Receiving this recognition marks an important milestone and one of the most memorable moments in my career.

This competition was indeed a challenging yet rewarding journey which allows my financial planning skills to develop and flourish. I would like to extend my sincere appreciation to the senior management and the entire support team for their generous guidance, close collaboration and constant encouragement throughout the journey. Your insights and encouragement have been instrumental to my growth and success.

I will always treasure the lessons learned from the competition. The knowledge and expertise I have gained will continue to shape my professionalism and fuel my passion. Going forward, I am even more committed to helping our customers craft tailored financial plans while continuously advancing my own development in financial planning. Thank you.

Winners of Silver Award

Group C



LI Meiling, Phoebe

China CITIC Bank International Limited



MA Cheung Hong, Ben

Hang Seng Bank Limited



WONG Chiu Man, Charmaine

Hang Seng Bank Limited

Group B



TAI Wai Kuen, Henry

Bank of China (Hong Kong) Limited



WU Yuen Wai, Fiona

Bank of China (Hong Kong) Limited



LEUNG Kung Ming, Anthony

Dah Sing Bank, Limited

Group A



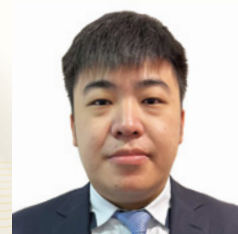
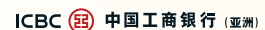
WONG Yat Sau, Steven

Dah Sing Bank, Limited



WONG Kwan Ho, Nathan

Hang Seng Bank Limited



HO Yu Yeung, Yurick

Industrial and Commercial Bank of China
(Asia) Limited

Winners of Bronze Award

Group C



CHAU Yiu Ming, Louis

Bank of China (Hong Kong)
Limited



WONG Tsz Yan, Hannah

China CITIC Bank
International Limited



LAM Hon Piu, Damon

Dah Sing Bank, Limited

Group B



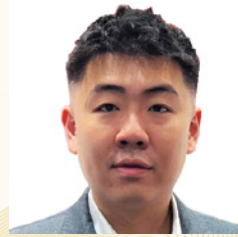
LEUNG Ka Ho, Tom

Bank of China (Hong Kong)
Limited



NG Wing Man, Jenny

China CITIC Bank
International Limited



LUK Chun Ho, Derik

Dah Sing Bank, Limited



LAM Tai Pong, Anson

DBS Bank (Hong Kong) Limited

Group A



CHAN Hoi Ki, Kelly

Bank of China (Hong Kong)
Limited



LEUNG Shuk Ling, Elsa

Bank of China (Hong Kong)
Limited



CHUNG Ka Ling, Florella

Dah Sing Bank, Limited



KWAN Sin Wa, Cindy

Nanyang Commercial Bank,
Limited

Winners of Certificate of Merit

Group B



CHAN Chun San, Eason

China CITIC Bank International Limited



FUNG Pui Yu, Elly

China CITIC Bank International Limited



MAN Ka Wing, Eric

China CITIC Bank International Limited



CHING Fei Chung, Charlotte

Citibank (Hong Kong) Limited



XIA Xiaoyi, Shallian

Citibank (Hong Kong) Limited



CHEUNG Chun Mo, Moses

Dah Sing Bank, Limited



CHENG Cheung Chun, Jeff

Hang Seng Bank Limited



LAI Kwan Shing, Leo

Hang Seng Bank Limited



NG Yan Ting, Silvia

Hang Seng Bank Limited



CHIU Chit Ling, Jeremy

Industrial and Commercial Bank of China (Asia) Limited



CHIU Sze Chung, Sam

Nanyang Commercial Bank, Limited



LUK Ka Shing, Alex

Nanyang Commercial Bank, Limited



NG Ka Leung, Rick

Nanyang Commercial Bank, Limited

Winners of Certificate of Merit

Group A



MAN Kai Shui, Zon

Bank of China (Hong Kong) Limited



LO Tsz Hei, Vincent

China CITIC Bank
International Limited



NG Yin Wing, Ben

China CITIC Bank
International Limited



LEE Chun Hin, Gary

Citibank (Hong Kong) Limited



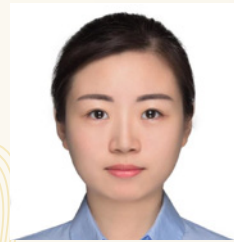
NG Yi Yung, Filia

Citibank (Hong Kong) Limited



WU Suyan

Hang Seng Bank Limited



ZHENG Yuan, Lico

Nanyang Commercial Bank, Limited



TANG Tat Sang, Keith

Shanghai Commercial Bank Limited



HUNG Man Kit

Bank of East Asia, Limited (The)



LU Peng Fei, Ely

Bank of East Asia, Limited (The)

Event Highlights



The honourable guests took a group photo on-stage to record his remarkable moment celebrating the success of the 18th HKIB OFMP Awards Presentation Ceremony & Gala Dinner (from left to right)

Carrie LEUNG, Chief Executive Office, **HKIB**

Haixia LI, Member, Executive Committee, **HKIB** and Deputy Chief Executive & Chief Human Resources Officer, **China CITIC Bank International Limited**

Dr Jimmy JIM, *Hon. Certified Banker*, Member, Executive Committee, **HKIB** and Managing Executive Officer and Head of Global Markets Department, **Industrial and Commercial Bank of China (Asia) Limited**

Rose KAY, Member, Executive Committee, **HKIB**, and Chief Operating Officer & Head of CEO Office, Hong Kong, **Standard Chartered Bank (Hong Kong) Limited**

Johnny WEI, Member, Executive Committee, **HKIB** and Head of Wholesale Banking, **OCBC Bank (Hong Kong) Limited**

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

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

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

Salina YAN, *JP*, Permanent Secretary (Financial Services), **Financial Services and the Treasury Bureau**

Rosita LOU, Acting Director, Financial Development Department, **The Monetary Authority of Macao**

WANG KE, Vice President, Council, **HKIB** and Chief Executive Officer, **OCBC Bank (Hong Kong) Limited**

Rannie LEE, *Hon. Certified Banker*, Member, Executive Committee, **HKIB** and Head of Wealth and Personal Banking, **Hang Seng Bank Limited**

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

Phoebe WONG, *Hon. Certified Banker*, Member, Executive Committee, **HKIB** and Deputy Chief Executive, Senior Executive Director & Group Head of Personal Banking, **Dah Sing Bank, Limited**

Winnie CHOI, Member, Executive Committee, **HKIB** and Managing Director, Alternate Chief Executive, Head of Onshore Citigold and Citigold Private Client, **Citibank (Hong Kong) Limited**

Shirley PI, General Manager, **CTgoodjobs**

Event Highlights



Opening Remarks Speaker
Salina YAN, JP, Permanent Secretary (Financial Services), Financial Services and the Treasury Bureau



Closing Remarks Speaker
Carrie LEUNG, Chief Executive Office, HKIB

Event Highlights

Winners of Top Nominations Award

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



Bank of China (Hong Kong) Limited

Representative: Elia CHONG, Deputy General Manager (Branch Management), Personal Banking and Wealth Management Department



China CITIC Bank International Limited

Representative: Wendy YUEN, Head of Personal & Business Banking Group, PBG Management, Personal & Business Banking Group



Dah Sing Bank, Limited

Representative: Charmaine LO, General Manager, Head of Branches

Event Highlights



Hang Seng Bank Limited
Representative: Theodore MAK,
Head of Retail Distribution



Industrial and Commercial Bank of China (Asia) Limited
Representative: Dr Jimmy JIM, Managing Executive
Officer and Head of Global Markets Department



Nanyang Commercial Bank, Limited
Representative: LAM Wai Hang,
Head of Sales Management Division

Event Highlights

Winners of Grand Award

Presenter: **Salina YAN, JP**, Permanent Secretary (Financial Services), **Financial Services and the Treasury Bureau**



Group C - LIU Chun Man, Raymond
China CITIC Bank International Limited



Group B - HUNG Hing Kiu, Keith
DBS Bank (Hong Kong) Limited



Group A - LAM Sheung Wa, Marco
China CITIC Bank International Limited

Event Highlights

Winners of Gold Award

Presenter: **Salina YAN, JP**, Permanent Secretary (Financial Services), **Financial Services and the Treasury Bureau**



Group C - CHUNG Mei Yan, Iris
Bank of China (Hong Kong) Limited



Group C - CHAN Kwun Sing, James
Hang Seng Bank Limited



Group B - TSANG Chi Wai, Kate
China CITIC Bank International Limited



Group B - CHAU Mun Shing, Mike
Industrial and Commercial Bank of China (Asia) Limited



Group A - CHAN Ka Yan, Yanica
China CITIC Bank International Limited



Group A - CHEN Peipei, Emma
(represented by Dennis WONG)
Hang Seng Bank Limited

Event Highlights

Winners of Outstanding Contribution Award

Presenter: **Carrie LEUNG**, Chief Executive Office, HKIB



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



TANG Chak Hong, Kelvin
Chief Manager, Wealth Management,
Retail Business Management Department
Bank of Communications (Hong Kong) Limited



TIU Kin Shing, Andy
Chief Manager, Wealth Management,
Retail Business Management Department
Bank of Communications (Hong Kong) Limited



Kenny MUNG
Senior Investment Consultant,
Branch Distribution & Services Department
Bank of East Asia, Limited (The)



WONG Wa Fung, Dominic
Investment Advisory Specialist, Wealth Management,
Personal & Business Banking Group
China CITIC Bank International Limited

Event Highlights



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



YAU Wing Sum, Winson
Executive Director, Investment Products Management
DBS Bank (Hong Kong) Limited



Anthony WONG
Head of Wealth Sales, Distribution Department
Hang Seng Bank Limited



Michael TING
Head of Investment Product Specialists Division
Nanyang Commercial Bank, Limited



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

Acknowledgement

The Hong Kong Institute of Bankers wishes to thank our joint organiser, supporting and participating organisations, sponsor, judges, moderators and contestants for their genuine efforts and hard work in making the 18th HKIB Outstanding Financial Management Planner Awards a success.

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Participating Organisations



Listed in alphabetical order by organisation name

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Vision

To be the leading institute, nurturing banking professionals and building a strong, diverse pool of competent, ethical, and future-ready talent for Hong Kong and beyond.

Mission

To advance banking excellence by empowering professionals to become future-ready through training, certification, and collaboration.



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Past Event Photos



Past Event Photos



Past Event Photos



Past Event Photos



The background of the page is a heavily blurred photograph of an awards ceremony. It shows several people on a stage, some of whom appear to be holding awards. The lighting is bright, and the overall scene is out of focus, creating a sense of a significant event.

Awards Presentation