

CONNECTING VALUES, CREATING IMPACT: FINANCIAL EDUCATION AND ESG FOR A SUSTAINABLE WORLD



IFPHK FINANCIAL EDUCATION AND ESG LEADERSHIP AWARDS | 2025

Organizer:



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Connecting Values, Creating Impact: Financial Education and ESG for a Sustainable World

As CEO of The Institute of Financial Planners of Hong Kong (IFPHK), it is my privilege to introduce the Financial Education and ESG Leadership Awards 2025, an initiative that embodies our 25th anniversary theme: "Connection and Future". In a world where AI may automate 80% of tasks, the not replaceable power of human connection, namely passing down wisdom, upholding ethical standards, and safeguarding our shared humanity, has never been more vital.

This year's awards, "Connecting Values, Creating Impact," spotlight the transformative synergy of financial education and ESG principles. Financial literacy unlocks economic agencies, while ESG ensures growth serves society. Together, they redefine success where profit and purpose converge to build a resilient, inclusive global economy.

Why This Matters Now

- **For Businesses:** In a market where 85% of investors demand ESG integration, leadership in sustainability is no longer optional. It is a competitive imperative.
- **For Society:** Financial inclusion and ethical governance are the cornerstones of a future where no community is left behind.

We Celebrate Trailblazers Who

- **Democratize Financial Knowledge:** Bridging literacy gaps through grassroots programs or innovative digital tools.
- **Champion ESG Action:** Embedding sustainability into core strategies, from net-zero supply chains to equitable governance.
- **Drive Collective Impact:** Whether for-profit or nonprofit, we spotlight collaborations that scale systemic change.

The Opportunity for You

By participating, your organization gains:

- **Global Recognition:** Visibility among policymakers, investors, and consumers who prioritize sustainability.
- **Industry Leadership:** A platform to shape best practices and inspire peers.
- **Legacy Building:** Cement your role as an architect of a just, sustainable economy.

A Call to Action

This is more than an awards program. It is a movement. Let us prove that finance can be the greatest lever for equitable progress. Submit your entry, share your story, and join a coalition of visionaries committed to:

- **Connecting:** Values across generations, sectors, and borders.
- **Creating:** Measurable, lasting impact for people and planet.



"The future belongs to those who act today."

Dr. Paris Yeung

Chief Executive Officer

Institute of Financial Planners of Hong Kong

| ABOUT THE AWARDS

The IFPHK was established in 2000 to develop and maintain high professional standards and self-discipline for providers of financial planning services in Hong Kong to ensure that consumers are well-served and their interests protected.

To align with the IFPHK's mission to increase awareness of the importance of financial planning, the IFPHK has launched the "IFPHK Financial Education Leadership Awards" (The FELA) since 2018 to pay tribute to commercial firms, non-profit organizations, and individuals that have made significant efforts in improving financial literacy levels in Hong Kong.

Since its inauguration in 2018, 42 organizations and nearly 100 individuals have been lauded with the FELA as a hallmark of their devotion to financial education for the community. To encourage and honour achievements that address specific financial education needs, the award criteria will be finetuned as and when appropriate to move with the times.

In 2022, ESG criteria has been added to FELA to deliver a stronger message of a sustainable mission of the awardees. It is hoped that refreshing the Awards from time to time, it may reflect justly on the social needs and recognize the corporate leaders that constantly pick up and move on.

| OBJECTIVES

1. To recognize commercial firms, non-governmental organizations (NGOs), non-profit organizations (NPOs) such as schools, professional bodies, charities, social enterprises, etc., in providing public financial education to the community on a pro bono basis
2. To promote the importance of financial planning in Hong Kong
3. To raise the overall level of financial literacy in Hong Kong

| ELIGIBILITY

Open to all Hong Kong commercial firms and non-profit entities who have invested, undertaken, or completed their financial education tasks between **1 July 2024** and **30 June 2025**. To be eligible for the awards, firms must also fulfill the respective ESG achievement as specified.

| KEY DATES



| ASSESSMENT AND JUDGES

The judging panel is comprised of the IFPHK's board members and experienced CFP® professionals.

| APPLICATION

Applications should be submitted via the websites together with supporting documents.

The submission deadline is **31 August 2025**.



| ENQUIRIES

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CORPORATE FINANCIAL EDUCATION AND ESG LEADERSHIP

This Award aims to recognize collective efforts that commercial firms and non-profit entities have made to improve financial literacy in Hong Kong. All awardees are also determined in contributing to a sustainable city through efforts in ESG.

| Award | Commercial Firms / Non-profit Entities | |
|---|--|---|
| Gold | Achieving 4 criteria or more | + ESG Engagement Having 2 Internal + 2 External ESG Initiatives |
| Silver | Achieving 3 criteria | |
| Bronze | Achieving 2 criteria | |
| Best Corporate Financial Education and ESG Leadership of the Year For the commercial firm that has achieved the most criteria. | | |

ASSESSMENT CRITERIA

The Criteria set out to demonstrate how financial education could be met. Submissions of the firms should specify and elaborate on the criteria engaged.

- Digital Campaigns/App:** Websites, apps, videos, social media platforms, online tutorials or hotlines that are available to consumers with free and impartial sources of information, tools, and resources. Consumers are able to navigate the financial landscape and access the information they need
- Print:** Publication of books, toolkits, and training materials for free financial education to the public
- Events:** Providing public financial education through engaging and exciting events, road shows, focus groups, games, etc.
- Support of Vulnerable Groups:** Special programs or resources for specific cohort groups, e.g., people experiencing high financial stress, people with low income or few assets, vulnerable seniors, and religious differences as they pertain to loans and borrowings
- Innovative Examples/Creativity:** Actively adopting technologies in business models for a better financial education future, including the internet of things, artificial intelligence, and the sharing economy
- Co-effort Examples:** Partnership or sponsorship to support a financial education program run by a charity, school, non-profit organization, or policymaker
- Volunteering Programs:** Building a sustainable volunteer program in which promoting financial education is one of the goals or activities
- Staff Engagement Programs:** Providing workplace financial wellness programs for employees. Encouraging lifelong learning and attaining professional qualifications in financial planning and sustainability investment e.g., CFP certification, AFP certification, QRA qualification, etc.
- Research Examples:** Commissioning research to highlight the need for financial education so that the best practices can be shared and publicized
- Digital Finance Related:** Any financial education initiative that focuses on digital finance, including but not limited to crypto-assets and Central Bank Digital Currencies (CBDCs)

I ESG ENGAGEMENT

To be qualified as an awardee of the “Corporate Financial Education and ESG Leadership”, firms must showcase their commitment in the sustainable development of their organizations, as well as the community in every aspect. Therefore, applicants must also submit **TWO INTERNAL + TWO EXTERNAL ESG INITIATIVES** they have done over the year. They must provide proof of evidence of the initiatives, e.g. annual report, sustainability report, website, press release etc.

What are Categorized as ESG?

ESG stands for Environmental, Social and Governance. It refers to the three key factors that investors and stakeholders consider when evaluating the sustainability and ethical impact of a company or organization.

Environmental includes a company's impact on the environment and its efforts to manage and mitigate environmental risks and opportunities. This includes but not limited to:

- Reducing Carbon Emissions
- Sustainable Sourcing
- Protecting Biodiversity
- Minimizing Waste Production
- Donation Program to Environmental Cause
- Developing Sustainable Energy Solutions
- Green Office

Social refers to a company's impact on people and communities. This includes but not limited to:

- Supporting Community Development
- Promoting Diversity and Inclusion
- Supporting Employee Volunteering
- Advocating and implementing sustainable investment
- Promoting Employee Relations
- Valuing Human Rights
- Ensuring Product Safety and Quality

Governance factors relate to a company's management and decision-making structures. This includes but not limited to:

- Ensuring Transparency Business Practices
- Implementation of a Broad Diversity Policy
- Promoting Ethical Leadership
- Promoting Executive Compensation
- Ensuring Shareholder Rights
- Implementing Anti-corruption Policies

What is Internal and External ESG?

Internal ESG refers to ESG programs that take place within the organization, targeting internal stakeholders.

External ESG refers to ESG programs that are dedicated to the public, targeting external stakeholders.

Below are some examples but not limited to:

Internal ESG

- Trainings and Workshops
- Competitions
- Incentives
- Certification Scheme
- Green Office
- Leadership Programs

External ESG

- Green Buildings
- Biofuels and Carbon Offsetting
- Sustainable Packaging
- Volunteering
- Education Program
- Community Engagement

CORPORATE PROGRAM FEE

Commercial Firms

**HK\$49,800 –
HK\$59,800**

Non-profit entities

HK\$5,000

The above fee includes:

Trophy

As a token of appreciation, awardees will be presented with a trophy at the Awards Presentation Ceremony to showcase their commitment in promoting financial wellbeing and corporate social responsibility.

Logo Use

Awarded commercial firms are eligible to use the award logo for promotional purposes (1 January 2026 – 31 December 2026). The “Use of Mark Guidelines” will be provided.

Awards Presentation Ceremony

Each awarded commercial firm, and non-profit entities will be invited to attend the Ceremony. To mark this memorable occasion, government officials and industry leaders will be invited to witness the naming of the awardees.

Marketing Exposure

Names and logos of the awarded firms will be seen in the promotional materials, including the campaign webpage, program booklet, media, and social media promotion, etc.

Corporate Program Fee

| List of Benefits | Commercial Firms HK\$59,800 | Commercial Firms HK\$49,800 | Non-profit Entities HK\$5,000 |
|---|--|--|--|
| Complimentary Seats | | | |
| Tables / Seats at Awards Presentation Ceremony (including award representative) | 1 Table (10 Seats) | Half Table (5 Seats) | 1 Seat |
| Acknowledgement | | | |
| Trophy presentation at Awards Presentation | • | • | • |
| Advertisement | | | |
| Advertisement in Advisors Today | 1 x Full Page 4C | 1 x Full Page 4C | / |
| Promotion Exposure | | | |
| Name mentioning in event release | • | • | • |
| Name and Logo in campaign webpage | • | • | • |
| Post event feed in IFPHK social media platforms | • | • | • |
| Use of Logo Rights | | | |
| Eligible to use the awarded logo for one year | • | • | • |

Remarks: The content of this package and all insertion dates are subjected to the Organizers’ final approval.

| 2024 EVENT HIGHLIGHTS



In its seventh year of making, the FELA2024 was once again a resounding success with 11 companies accoladed at the awards presentation ceremony. Over 100 prestigious guests from the government, regulatory, industry and nonprofit making sectors were seen at the occasion to celebrate collective effort in pro bono financial education. The IFPHK is also privileged to have 13 esteemed organizations support the Awards.

Best Corporate Financial Education and ESG Leadership of the Year



AIA International Limited



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



**Chow Tai Fook Life Insurance
Company Limited**



**FWD Life Insurance Company
(Bermuda) Limited**



Corporate Financial Education and ESG Leadership (Gold Award)

- AIA International Limited
- Bank of Communications (Hong Kong) Limited
- Chow Tai Fook Life Insurance Company Limited
- FWD Life Insurance Company (Bermuda) Limited
- Hang Seng Bank
- Hong Kong Family Welfare Society Financial Education Centre
- Prudential Hong Kong Limited
- Shanghai Commercial Bank Limited
- The Education University of Hong Kong
- The Hang Seng University of Hong Kong
- Tung Wah Group of Hospitals Healthy Budgeting Family Debt Counselling Centre

Remarks: In case of any dispute, the decision of the organizer will be final and binding on all parties concerned.

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| SUPPORTING ORGANIZATIONS



** In alphabetical order after regulators and government agencies.*

IFPHK ESG Statement

Our Environmental, Social and Governance (ESG) policy is anchored in ESG promotion to our stakeholders. We are dedicated to advocate ESG education, deliver its benefits to, and raise awareness among our members and relevant professionals in the business community.

Based on the latest trend of ESG knowledge and development, we aim to leverage academic research and industry expertise to advance our ESG practices to raise professional standards of financial planners in Hong Kong and Asia. IFPHK will implement our ESG policy through:

- Integrating ESG concepts into the six-step financial planning process
- Disseminating our latest ESG integration in financial planning to stakeholders and the community through our regular and designated channels such as seminars, conferences and award recognition