

合辦機構
Co-organizers:



媒體贊助
Media Sponsor:



傑出財務策劃師
THE BEST
Financial Planner Award 2020

查詢及報名

WhatsApp

5720 6641

截止報名日期

2020年7月10日

(下午3時正)

決賽日期

10月22日

專誠衛您

面對瞬息萬變的環球局勢，作為專業財務策劃師，如何為客戶提供適時和合宜的理財方案？
能夠幫助客戶聚焦穩妥的長遠目標，承載短期的金融風浪。

目的 Objective

隨著人均壽命延長和社會福利開支收緊，財務策劃及財富管理對香港市民的生活愈趨重要。今時今日，投資理財的天空變得愈來愈大，客戶需要的不僅是一位保險顧問，而是一位全面專業，能助客戶實現人生各階段理財需要的財務策劃師。事實上，適者生存，從業員若不盡快趕上財務策劃的列車，提升個人競爭力，實在難以在這大趨勢下生存。為此，香港人壽保險從業員協會（下稱「保協」）及香港經濟日報舉辦傑出財務策劃師大賽（下稱「BFPA」），以表彰一眾為客戶提供優質理財服務的同業。

With longer life expectancy and tightened government expenditure on social welfare, financial planning and wealth management are becoming more crucial to the livelihood of Hong Kong citizens. Thus, the Life Underwriters Association of Hong Kong (hereinafter "LUAHK") and Hong Kong Economic Times organize the Best Financial Planner Award (hereinafter "BFPA") to honor and recognize Hong Kong's most outstanding financial planners for their professionalism and dedication in serving the needs of their clients.

參賽資格 Eligibility

每間贊助公司均可提名其符合下列要求之財務策劃顧問參賽：

Each sponsoring company may nominate their financial planners to the BFPA competition. Applicants who meet the following requirements are eligible to apply:

- 為「保協」2020年度會員
An active member of LUAHK in year 2020
- 為贊助公司之財務策劃顧問
A financial planner of sponsoring company
- 2019年全年或於2020年7月10日或之前的一年內首年佣金達HK\$120,000或以上
First Year Commission HK\$120,000 or above in the year of 2019, or within a year on or before 10 Jul 2020

參賽要求 Requirement

每位參賽者必須於**2020年7月10日下午3時或之前**提交下列文件：

Each applicant shall submit their proposal **no later than 3pm of 10 Jul 2020** including

- 填妥大會指定之參賽者資料表格，並釘製於財務計劃書上
Fill-in the applicants' personal information with our designated form and staple it in front of the financial proposal
- 書面財務計劃書一式兩份
親身遞交或郵寄送抵「保協」辦事處（香港北角蜆殼街9-23號秀明中心23樓A-D室）
2 hard copies, in duplicate, of his/her proposal in written directly to LUAHK office (Unit A-D, 23/F. Seabright Plaza, 9-23 Shell Street, North Point, Hong Kong) in person or by post
- 將財務計劃書之電子檔(PDF檔及微軟WORD檔各一份)WhatsApp至BFPA專線(+852 5720 6641)。財務計劃書之微軟WORD檔，必須能顯示整份計劃書之總字數
Submit the financial proposal e-copy (in PDF and Word format) to BFPA Hotline through WhatsApp +852 5720 6641. Word count must be shown in the word format.

比賽只限贊助公司之財務策劃顧問參賽，提名參賽人數不設上限，惟每公司不能少於5位「傑出財務策劃師入選者」參賽，每位參賽者只可提交一份計劃書。**不論任何原因，逾期遞交之計劃書恕不受理。**

Only financial planners of sponsoring companies are eligible to join. No limit on the number of nomination and application. However, each company shall have at least 5 BFP Qualifiers. Each applicant shall submit one proposal only. **Late submission, no matter whatever reason, shall not be accepted.**

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本年主題 Theme of the Year

「專誠衛您」

面對瞬息萬變的環球局勢，作為專業財務策劃師，如何為客戶提供適時和合宜的理財方案？能夠幫助客戶聚焦穩妥的長遠目標，承載短期的金融風浪。

費用 Fee

- 申請費：每位HK\$648 (早鳥優惠HK\$548，2020年6月12日或之前報名)
Application fee: HK\$648 for each applicant (Early bird discount HK\$548 on or before 12 June 2020)
- 上訴費：每位每次HK\$200
Appeal fee: HK\$200 per head per time

賽程 Programme

初賽 First Round	<p>所有參賽者必須提交書面財務計劃書一式兩份及其PDF、微軟WORD檔。符合最基本要求之參賽者將獲「2020 傑出財務策劃師入選者」名銜。每間贊助公司之第三、四及五名將獲「2020 傑出財務策劃師 - 優異獎」名銜；第一、二名將進入決賽競逐「2020 傑出財務策劃師 - 金獎」及「2020傑出財務策劃師 - 銀獎」名銜。贊助公司之「2020傑出財務策劃師 - 入選者」人數如不足5名，所有參賽者將被取消資格。</p> <p>Applicants are required to submit their financial proposals, in duplicate, together with PDF file and Microsoft WORD file. For those who meet our minimum requirements, they will be awarded as 2020 BFP Qualifiers. Among all qualifiers of that company, the 3rd, 4th and 5th score the highest will be awarded as 2020 BFP - Merit Award. The top 2 qualifiers will enter the final round to compete for 2020 BFP - Silver Award, and 2020 BFP - Gold Award. Each company shall have at least 5 2020 BFP Qualifiers. Otherwise, all the applicants from that company will be disqualified.</p>
決賽 Final Round	<p>每間贊助公司之首兩名出線者須於評審團前即場演譯其計劃書及解答評審團的提問。每間贊助公司得分最高之入選者將獲「2020 傑出財務策劃師 - 金獎」名銜，第二名則獲「2020 傑出財務策劃師 - 銀獎」名銜。而總得分最高之金獎得主將獲「2020 保協傑出財務策劃師」名銜。</p> <p>Top 2 qualifiers from each sponsoring company will enter the final round and give presentations in front of the panel of judges. Qualifiers with the highest score of each sponsoring company will be awarded as 2020 BFP - Gold Award. The first runner-up will be awarded as 2020 BFP - Silver Award. Applicant who obtain the highest score among all gold awardees will be awarded as 2020 LUA BFP.</p>
公司大獎 Company Awards	<p>經過初輪評審後，如贊助公司擁有8位或以上入選者，則可爭奪兩個公司大獎。「傑出財務策劃公司大獎」將由最多入選者之公司獲得。「優秀財務策劃公司大獎」將由首30名入選者中總分最高之公司獲得。</p> <p>After the first round assessment, sponsoring companies with 8 or more qualifiers can compete for two company awards. Company with highest number of qualifiers will be awarded 2020 Best Financial Planning Company Award. Company with highest total score among top 30 qualifiers will be awarded 2020 Excellent Financial Planning Company Award.</p>

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初賽：書面財務計劃書

First Round: Written Proposal

1. 每位參賽者只能提交一份財務計劃書。
Each applicant shall submit one financial proposal only.
2. 計劃書必須為真實個案，並以繁體中文、簡體中文或英文撰寫。
Proposal shall be written in Traditional Chinese, Simplified Chinese or English, based on case.
3. 填妥大會指定之參賽者資料表格，並釘製於財務計劃書上。
Fill-in the applicants' personal information with our designated form and staple it in front of the financial proposal.
4. 整份計劃書(包括封面、目錄及附錄)不能顯示個案客戶、公司及有關產品之真實名稱。如有需要，請以假名代替。
Real client name, company name and product names shall be avoided throughout whole proposal. Please use pseudonym as replacement if necessary.
5. 必須清楚顯示所有引用資料及數據之出處來源。
Source of all citation, statistics and data shall be clearly provided in proposal.
6. 參賽者請嚴格遵照以下要求：以微軟WORD檔編寫，接受新細明體字型，最少12點字體，單行間距；內文篇幅至少10頁，最多20頁A4紙(即至少4,000個中文字或1,800個英文字)；不包括封面、目錄及附錄，並須釘裝成冊。
Applicant have to strictly follow the following requirements in the written proposal: at least 12 font size Times New Roman single-spaced; the word count must be at least 1,800 in English or 4,000 in Chinese; the content must be no less than 10 A4 pages, at most 20 A4 pages (excluding cover page, table of contents and appendixes); binding required.
7. 所有參賽之計劃書之版權為「保協」所擁有。
All proposals submitted shall be property of LUAHK.
8. 參賽者必須遵守財務策劃師之專業操守，例如知識產權及客戶資料保密原則等。如發現抄襲、計劃書格式不合規格等，參賽者將被取消參賽資格。
All professional rules of conduct, such as client confidentiality and intellectual property, must be observed. In case of plagiarism, wrong format of proposal and so forth, applicant shall be disqualified.

決賽：口頭匯報

Final Round: Oral Presentation

1. 每間贊助公司首兩名入選者須於評審團面前即席演譯其財務策劃書。
Top 2 qualifiers from each sponsoring company are required to perform a live demonstration of their financial proposals in front of the panel of judges.
2. 參賽者可以廣東話、普通話或英文匯報。
Oral presentation shall be done either in Cantonese, Mandarin or English.
3. 每位參賽者有15分鐘完成口頭匯報，及約10分鐘回應評審團提問。
Each applicant shall have 15 minutes for presentation and around 10 minutes for answering questions from the panel of judges.

評審團

Panel of Judges

初賽 First Round	大學講師、財務專才或媒體領導 University Scholars, Financial Experts or Top Management of Media
決賽 Final Round	大學講師、財務專才或媒體領導 University Scholars, Financial Experts or Top Management of Media

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評分準則

Assessment Criteria

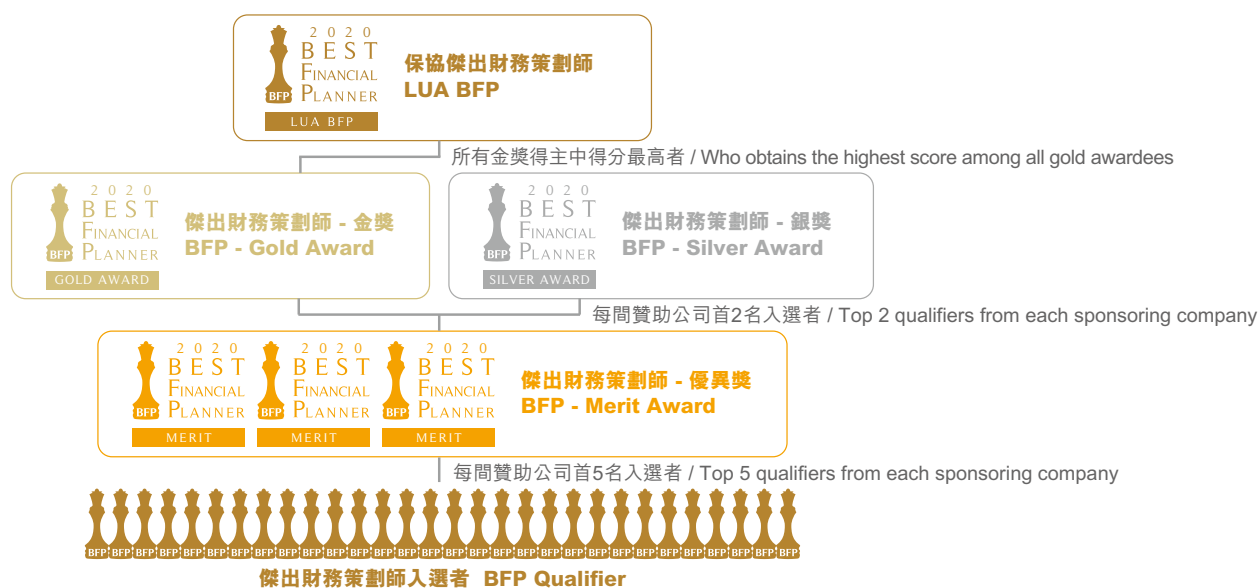
準則 Criteria	百分比 Weighting	內容 Content
建議方案 Recommendation	25%	<ul style="list-style-type: none">• 評估解決方案是否切合客戶的需求。• To evaluate whether the proposed solutions best suit the client's needs.
認清財政狀況 Understanding of Financial Status	20%	<ul style="list-style-type: none">• 準確評估及分析客戶目前的財務狀況及過往投資經驗如何達致其理財目標。• To assess and analyze current financial condition and previous investment experience of the client so as to meet the client's goals.
認清理財目標 Recognizing of Financial Goals	15%	<ul style="list-style-type: none">• 真正了解客戶的當前和未來的財務目標及資金需求。• 準確評估及向客戶解釋計劃中須面對的風險。• To prove the understanding of the client's current and future financial goals regarding his/her financial needs respectively.• To assess whether the planner has explained to the client the risks that may arise in the proposal.
建議之適切性 Suitability of Advices	10%	<ul style="list-style-type: none">• 評估方案是否按主題、道德準則、程序、公平原則及解決方案的比較優勢，為客戶提供度身定制的理財方案。• 提交的理財方案是否合乎邏輯及其可行性。• To provide a tailor-made solution to the client in accordance to the theme, code of ethics, proper procedures, fairness, and successful presentation of the comparative advantages of the proposed solutions over the next best possible alternatives.• To demonstrate both logical reasoning as well as feasibility of the recommended solutions.
資料數據提供 Information Disclosure	10%	<ul style="list-style-type: none">• 提供足夠及相應的財務及市場資訊，以符合客戶之理財需要。• 提供計劃書所引用的資料及數據之出處來源。• To provide sufficient financial and market information relevant to the client's requirements.• To provide source of citation, statistics and data.
計劃書結構 Structure of Proposal	10%	<ul style="list-style-type: none">• 根據不同的生命週期階段，評估可預見但隱藏的財務需求。• 表現對客戶的目標具充份了解，並根據財務狀況分析、市場調查資料及規管準則，為客戶提出適切的財務計劃書。• To evaluate how the planner foresees hidden financial needs according to different stages of life cycle.• To demonstrate high degree of understanding of the client's goals and propose suitable financial proposal to meet the goals referred to the financial status analysis, market research information and regulatory environment.
評審團印象 Discretion of Judges	10%	<ul style="list-style-type: none">• 評估整體報告及計劃書表現。• To measure the overall presentation of the financial proposal.

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名銜 Awards

比賽回合 Rounds	名銜 Awards	名額 Quotas	獎項 Prizes
初賽 First Round	「2020傑出財務策劃師入選者」 2020 Best Financial Planner Qualifier (2020 BFP Qualifier)	所有入選者 All Qualifiers	入選證書、名銜認證信、相片及名字登報 Certificate of Qualifier, Recognition Letter, Photo and Name on Newspaper
	「2020傑出財務策劃師 - 優異獎」 2020 Best Financial Planner – Merit Award (2020 BFP – Merit Award)	每贊助公司3名 3 Awardees Per Sponsoring Company	優異獎證書、名銜認證信、相片及名字登報 Certificate of Merit Award, Recognition Letter, Photo and Name on Newspaper
決賽 Final Round	「2020傑出財務策劃師 - 銀獎」 2020 Best Financial Planner – Silver Award (2020 BFP – Silver Award)	每贊助公司1名 1 Awardee Per Sponsoring Company	銀獎證書、名銜認證信、相片及名字登報、獎盃 Certificate of Silver Award, Recognition Letter, Photo and Name on Newspaper, Trophy
	「2020傑出財務策劃師 - 金獎」 2020 Best Financial Planner – Gold Award (2020 BFP – Gold Award)	每贊助公司1名 1 Awardee Per Sponsoring Company	金獎證書、名銜認證信、相片及名字登報、獎盃、巴士廣告、個人宣傳短片 Certificate of Gold Award, Recognition Letter, Photo and Name on Newspaper, Trophy, Bus Advertisement, Personal Promotion Video
	「2020保協傑出財務策劃師」 2020 LUA Best Financial Planner (2020 LUA BFP)	1名 1 Awardee	出任「2020保協傑出財務策劃師頒獎典禮」分享嘉賓 Being the Sharing Speaker in 2020 LUA BFPA Ceremony
公司大獎 Company Awards	「2020傑出財務策劃公司大獎」 2020 Best Financial Planning Company Award	1間贊助公司 1 Sponsoring Company	公司宣傳短片、獎盃 Company Promotion Video, Trophy
	「2020優秀財務策劃公司大獎」 2020 Excellent Financial Planning Company Award	1間贊助公司 1 Sponsoring Company	公司宣傳短片、獎盃 Company Promotion Video, Trophy



* 每間贊助公司之傑出財務策劃師入選者如不足5名，所有參賽者將被取消資格。

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時間表

Timeline

時間 Time	活動 Event
2020年1月31日 1 Jan 2020	公司贊助截止 Deadline of Company Sponsoring
2020年3月-7月 Mar - Jul 2020	公司拜訪及簡報會 Training Visit & Briefing Session
2020年6月12日 12 Jun 2020	早鳥優惠截止 Deadline of Early Bird Discount
2020年5月-6月 May - Jun 2020	保協理財策劃書實踐工作坊 (面授/網上) LUA Financial Proposal Writing Workshop (Face-to-Face/Online)
2020年7月10日(下午3時正) 10 Jul 2020 (3pm)	報名及遞交財務策劃書截止 Deadline of Application and Financial Proposal Submission
2020年9月18日 18 Sep 2020	初賽 - 公佈入選者及首2名出線者 First Round - Announcement of Qualifier and Top 2
2020年10月22日 22 Oct 2020	決賽 Final Round
2020年11月 Nov 2020	邀請出席頒獎典禮 Invitation to Ceremony 分發電子門券 e-Ticket Delivery
2020年12月 Dec 2020	2020保協傑出財務策劃師頒獎典禮 2020 LUA BFPA Presentation Ceremony

查詢及報名 Inquiry & Application **WhatsApp 5720 6641**

保協理財策劃書實踐工作坊 (面授/網上)

LUA Financial Proposal Writing Workshop (Face-to-Face/Online)

「保協」特設工作坊旨在令各位準參賽者更有效地撰寫財務策劃書：

費用：每位HK\$300

(參加者必須為2020年度「保協」會員)

名額：45人

內容：***完成工作坊者可獲得3個IA CPD學分***

- 財務策劃書結構
- 財務策劃書撰寫技巧及工具
- 歷屆金獎得主個案分享
- 2020 BFPA比賽詳情及重要事項

This workshop aims to help every potential applicant to complete his/her financial proposal in an easier and effective way:

Fee: HK\$300/head (participant must be a current member of LUAHK in 2020)

Quota: 45 participants

Content: ***participant can obtain 3 IA CPD hours after completion of this workshop***

- structure of financial proposal
- skills and tools of writing financial proposal
- sharing by gold awardees
- details and important notes of 2020 BFPA


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成為市民心目中的傑出財務策劃師

Our Recognition to the Best Financial Planner



 香港人壽保險從業員協會
The Life Underwriters Association of Hong Kong

香港北角蜆殼街9-23號秀明中心23樓A-D室
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電話 Tel : 2570 2256 傳真 Fax : 2570 1525 電郵 Email : info@luahk.org

網址 Website : www.luahk.org

掃一掃了解更多：



2020 BFPA



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