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2022  
**BEST**  
FINANCIAL  
PLANNER




保協傑出財務策劃師大賽

# THE BEST

Financial Planner Award 2022

10  
YEARS  
ANNIVERSARY  
十周年

查詢及報名

 5720 0236



截止報名

2022年6月10日(五)  
(下午3時正)

決賽

2022年10月14日(五)

頒獎典禮

2022年11月16日(三)

後疫年代

新挑戰 新經濟 新常態

## 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保協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, 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」2022年度會員  
An active member of LUAHK in year 2022
- 為贊助公司之財務策劃顧問  
A financial planner of the sponsoring company
- 2021年全年或於2022年6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 2021, or within a year on or before 10 Jun 2022

## 參賽要求 Requirement

參賽者必須於2022年6月10日下午3時或之前提交下列文件：

Applicant shall submit the following items **no later than 3pm of 10 Jun 2022**:

- 報名表格及繳付參賽費用  
Application Form and Payment
- 填妥及簽署參賽者聲明  
Application Declaration Form must be filled in and signed.
- 參賽者之個人資料(如：姓名、公司名稱、個人相片) 印在單頁A4紙上，並釘製於整份財務計劃書前，以便識別身份。  
Applicants should put their personal information (ie. full name, personal photo, name of the company) on a separated single sided A4 paper. It must be attached separately on the cover 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 financial proposal in written directly to LUAHK office (Units A-D, 23/F, Seabright Plaza, 9-23 Shell Street, North Point, Hong Kong) in person or by post
- 財務計劃書之電子檔(PDF檔及微軟WORD檔各一份)，上載到: [https://www.luahk.org/upload\\_application](https://www.luahk.org/upload_application)。財務計劃書之微軟WORD檔，必須能顯示整份計劃書之總字數 \* 書面及電子檔(PDF檔及微軟WORD檔) 內容必須一致  
Submit 2 e-copies, (1 in PDF and 1 in Microsoft Word format) by uploading to [https://www.luahk.org/upload\\_application](https://www.luahk.org/upload_application). Total word count must be shown. \* The content of the hard copies and e-files (in PDF and Word format) must be consistent.

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 apply. No limit on the number of nomination and application. However, each company shall have at least 5 BFP Qualifiers to join. Each applicant shall submit one proposal only. **The late submission, no matter or what reason, shall not be accepted.**

\* 如有任何爭議，「保協」保留最終決定權。「保協」亦保留修訂比賽內容、一切更改及解釋細則及條款之權利，而毋須事先通知。

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## 本年主題 Theme of the Year

「後疫年代 新挑戰 新經濟 新常態」

## 費用 Fee

- 申請費：每位HK\$648 (早鳥優惠HK\$548，2022年5月13日或之前報名)  
Application fee: HK\$648 for each applicant (Early bird discount HK\$548 on or before 13 May 2022)
- 上訴費：每位每次HK\$200  
Appeal fee: HK\$200 per head per time

## 賽程 Programme

<p>初賽 First Round</p>	<p>參賽者必須提交一份財務計劃書[一式兩份的書面財務計劃書及電子檔(PDF檔及微軟WORD檔各一)]。符合最基本要求之參賽者將獲「2022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「2022傑出財務策劃師 - 優異獎」名銜；第一、二名將進入決賽競逐「2022傑出財務策劃師 - 金獎」及「2022傑出財務策劃師 - 銀獎」名銜。贊助公司之「2022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 written financial proposals, in duplicate, together with the PDF file and Microsoft WORD file. For those who meet our minimum requirements will be awarded as <b>2022 BFP Qualifiers</b>. Among all qualifiers of that company, the 3rd, 4th and 5th score the highest will be awarded as <b>2022 BFP - Merit Award</b>. The top 2 qualifiers will enter the final round to compete for <b>2022 BFP - Silver Award</b>, and <b>2022 BFP - Gold Award</b>. Each company shall have at least 5 <b>2022 BFP Qualifiers</b>. Otherwise, all the applicants from that company will be disqualified.</p>
<p>決賽 Final Round</p>	<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「2022傑出財務策劃師 - 金獎」名銜，第二名則獲「2022傑出財務策劃師 - 銀獎」名銜。而總得分最高之金獎得主將獲「2022 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 <b>2022 BFP - Gold Award</b>. The first runner-up will be awarded as <b>2022 BFP - Silver Award</b>. Applicant who obtain the highest score among all gold awardees will be awarded as <b>2022 LUA BFP</b>.</p>
<p>公司大獎 Company Grand Awards</p>	<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 grand awards. The company with the highest number of qualifiers will be awarded <b>2022 Best Financial Planning Company Grand Award</b>. The company with the highest total score among top 30 qualifiers will be awarded <b>2022 Excellent Financial Planning Company Grand Award</b>.</p>

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## 初賽：書面財務計劃書 First Round: Written Proposal

- 每位參賽者只能提交一份財務計劃書[一式兩份的書面財務計劃書及電子檔(PDF檔及微軟WORD檔各一)]  
Each applicant shall submit one financial proposal only. (2 hard copies in duplicate and 2 e-copies, 1 in PDF and 1 in Microsoft Word format).
- 財務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。  
The financial proposal must base on the real case, written in Traditional Chinese, Simplified Chinese or English.
- 填妥及簽署參賽者聲明。  
Application Declaration Form must be filled in and signed.
- 參賽者之個人資料(如：姓名，公司名稱，個人相片)必須印在單頁A4紙上，並釘製於整份財務計劃書前，以便識別身份。若不是釘製在整份財務計劃書前，一概以取消參賽資格計。此印有個人資料的單頁A4紙不等於封面，只作內部記錄，不會呈交與評審，以示公正。  
Applicants should put their personal information (ie. full name, personal photo, name of the company) on a separated single sided A4 paper. It must be attached separately on the cover of the financial proposal, the applicant will be disqualified if the A4 paper is not attached on the cover of the financial proposal separately. The personal information printed on this A4 paper is not a cover. The purpose is to identify the applicant's identity for internal use. No personal information will be revealed to the judges.
- 所有內容均不能顯示任何可識別參賽者身份相關資料、個案客戶、任何保險公司/獨立理財公司及有關產品之真實名稱，請以假名代替。一經發現，一概取消參賽資格。  
The source of all citation, statistics and data must be clearly shown on the financial proposal. No relevant information that can identify the applicant, the real name of the customer, insurance company/ independent wealth management company or related products can be displayed on the financial proposal. If found, applicants will be disqualified. Please use pseudonyms as a replacement if necessary.
- 整份參賽財務計劃書，必須清楚顯示所有引用資料及數據之出處來源。  
The source of all citation, statistics and data must be clearly shown on the financial proposal.
- 請以微軟WORD檔編寫(必須能顯示整份計劃書之總字數)；建議用新細明體字型，最少12點字體，單行間距；除封面、目錄及附錄外，其他內文篇幅至少10單頁，最多20單頁(即至少4,000個中文字或1,800個英文字)，並須釘裝成冊。  
The financial proposal must be written in Microsoft WORD format, total word count must be shown. The financial proposal (excluding the cover page, table of contents and appendices) must be at least 10 pages, 20 pages in maximum (i.e. 4,000 Chinese characters or 1,800 English characters at least). Binding is required. It is recommended to write in Times New Roman; with at least 12 font size and single line spacing.
- 參賽財務計劃書，只按2022年大賽規則進行評分；歷屆之大賽規則將不作參考及爭議。  
All the submitted financial proposals are only assessed according to 2022 BFPA Competition rules and regulations; The assessment rules and regulations in the previous BFPA Competition will not be taken as a reference and debate.
- 所有參賽財務計劃書之版權為「保協」所擁有。  
All the submitted financial proposals shall be the property of LUAHK.
- 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/公司/產品等資料保密原則等。如發現抄襲、計劃書格式不合規格、違反資料保密原則等，參賽者將被取消參賽資格。  
All professional code of conduct, such as client, company, product, etc. and confidentiality and intellectual property, must be observed. With any violation in terms of plagiarism, wrong formats of proposals, disclosure of confidential information and so forth, applicants will be disqualified.

## 決賽：口頭匯報 Final Round: Oral Presentation

- 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.
- 參賽者可以廣東話、普通話或英文匯報。  
Oral presentation shall be delivered Cantonese, Mandarin or English.
- 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
建議方案及其適切性 Recommendation & Suitability of Advices	25%	<ul style="list-style-type: none"> <li>• 評估解決方案是否切合客戶的需求。</li> <li>• 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。</li> <li>• 提交的理財方案是否合乎邏輯及其可行性。</li> <li>• To evaluate whether the proposed solutions best suit the client's needs.</li> <li>• 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.</li> <li>• To demonstrate both logical reasoning and feasibility of the recommended solutions.</li> </ul>
認清財政狀況 Understanding of Financial Status	20%	<ul style="list-style-type: none"> <li>• 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。</li> <li>• To assess and analyze current financial condition and previous investment experience of the client so as to meet the client's goals.</li> </ul>
認清理財目標 Recognizing of Financial Goals	15%	<ul style="list-style-type: none"> <li>• 真正了解客戶的當前和未來的財務目標及資金需求。</li> <li>• 準確評估及向客戶解釋計劃中須面對的風險。</li> <li>• To prove the understanding of the client's current and future financial goals regarding his/her financial needs respectively.</li> <li>• To assess whether the planner has explained to the client the risks that may arise in the proposal.</li> </ul>
資料數據提供 Information Disclosure	10%	<ul style="list-style-type: none"> <li>• 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。</li> <li>• 提供計劃書所引用的資料及數據之出處來源。</li> <li>• To provide sufficient financial and market information relevant to the client's requirements.</li> <li>• To provide source of citation, statistics and data.</li> </ul>
計劃書結構 Structure of Proposal	10%	<ul style="list-style-type: none"> <li>• 根據不同的生命週期階段，評估可預見但隱藏的財務需求。</li> <li>• 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。</li> <li>• To evaluate how the planner foresees hidden financial needs according to different stages of life cycle.</li> <li>• 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.</li> </ul>
(初賽) 評審團印象 (First Round) Judges' Impression	20%	(初賽) <ul style="list-style-type: none"> <li>• 評估整體報告的完整性以及能否緊貼主題。</li> </ul> (First Round)
(決賽) 評審團印象及表述技巧 (Final Round) Judges' Impression		(決賽) <ul style="list-style-type: none"> <li>• 評估整體報告的完整性，表述報告方式及技巧以及能否緊貼主題。</li> </ul> (Final Round)

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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	「2022傑出財務策劃師入選者」 2022 Best Financial Planner Qualifier (2022 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
	「2022傑出財務策劃師 — 優異獎」 2022 Best Financial Planner – Merit Award (2022 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	「2022傑出財務策劃師 — 銀獎」 2022 Best Financial Planner – Silver Award (2022 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
	「2022傑出財務策劃師 — 金獎」 2022 Best Financial Planner – Gold Award (2022 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
	「2022保協傑出財務策劃師」 2022 LUA Best Financial Planner (2022 LUA BFP)	1名 1 Awardee	出任「2022保協傑出財務策劃師頒獎典禮」分享嘉賓 Being the Sharing Speaker in 2022 LUA BFPA Ceremony
公司大獎 Company Grand Awards	「2022傑出財務策劃公司大獎」 2022 Best Financial Planning Company Grand Award	1間贊助公司 1 Sponsoring Company	公司宣傳短片、獎盃 Company Promotion Video, Trophy
	「2022優秀財務策劃公司大獎」 2022 Excellent Financial Planning Company Grand 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。

\* Each company shall have at least 5 BFP Qualifiers. Otherwise, all the applicants from this company will be disqualified.

\* 如有任何爭議，「保協」保留最終決定權。「保協」亦保留修訂比賽內容、一切更改及解釋細則及條款之權利，而毋須事先通知。

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## 時間表 Timeline

時間 Time	活動 Event
2022年1月31日 31 Jan 2022	公司贊助截止 Sponsorship
2022年2月-5月 Feb-May 2022	宣傳活動: 公司拜訪、簡報會、金獎分享會 Promotion: Training Visit, Briefing Session & Gold Awardees' Sharing Session
2022年3月-5月 Mar-May 2022	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)
2022年5月13日 (五) 13 May 2022	早鳥優惠截止 Deadline of Early Bird Discount
2022年6月10日 (五) (下午3時正) 10 Jun 2022 (3pm)	報名及遞交財務策劃書截止 Deadline of Application and Financial Proposal Submission
2022年9月6日 (二) 6 Sep 2022	初賽 - 公佈入選者及首2名出線者 First Round - Announcement of Qualifier and Top 2
2022年10月14日 (五) 14 Oct 2022	決賽 Final Round
2022年11月 Nov 2022	邀請出席頒獎典禮 Invitation to Ceremony 分發電子門券 e-Ticket Delivery
2022年11月16日 (三) 16 Nov 2022	2022保協傑出財務策劃師頒獎典禮 [得獎者可獲邀出席頒獎典禮 (費用另計)] 2022 LUA BFPA Presentaion Ceremony (Awardees will be invited to join the ceremony, charges of the ceremony is not included)

所有活動日子待定，視乎疫情的發展。

All event dates to be confirmed, subject to the Covid-19 epidemic situation.

查詢及報名  
Inquiry & Application

WhatsApp 5720 0236

## 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2022年度「保協」會員)

內容： - 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  
- 2022 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 (The participant must be a current member of LUAHK in 2022)

Content: - structure of financial proposal  
- skills and tools of writing financial proposals  
- sharing by gold awardees  
- details and important notes of 2022 BFPA

\* 如有任何爭議，「保協」保留最終決定權。「保協」亦保留修訂比賽內容、一切更改及解釋細則及條款之權利，而毋須事先通知。

\* In case of any disputes, LUAHK shall reserve the rights of the final decision. LUAHK reserves the right to amend, cancel and interpret the above rules and regulations without prior notice.



香港人壽保險從業員協會  
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