



投資者及理財教育委員會  
Investor and Financial  
Education Council

## Inviting Your Support for Hong Kong Money Month 2020

## Background

Investor and Financial Education Council (IFEC) coordinated **Hong Kong Money Month (HKMM)** for three years. The first one organised 60+ activities promoted by nearly 90 organisations in 2017. The second one took place in March 2018 with 90+ free initiatives in various formats organised by IFEC and stakeholders.

In 2019, HKMM was held in the whole month of March:

**Launch ceremony:** 160 representatives from the government, finance, education and non-profit sectors.



**Initiatives:** 100+ free initiatives were organised for students, parents, working adults, investors, retirees and vulnerable groups.

# Support by Government and financial regulators

Investor and Financial Education Council (IFEC) will continue to coordinate HKMM 2020, and again seek the support by the Government and the financial regulators.

## Supported by



財經事務及庫務局  
Financial Services and  
the Treasury Bureau



教育局  
Education Bureau



HONG KONG MONETARY AUTHORITY  
香港金融管理局



保險業監管局  
Insurance Authority



積金局



SECURITIES AND  
FUTURES COMMISSION  
證券及期貨事務監察委員會

## Led by



投資者及理財教育委員會  
Investor and Financial  
Education Council



投委會  
IFEC

# Overview of HKMM 2020

**Objective:** Encourage people to actively manage their finances and maintain a “financially fit” lifestyle

2017	2018	2019	2020 (TBC)
Let's Talk about Money	Plan For Your Future	Plan For Your Future: Act Now	Financial Fitness

## Target segments:

Youth	Working Adults	Elderly	Vulnerable Groups	School Children
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\*IFEC's *Financial Literacy Monitor 2019* shows that the young and the old are two segments with lower financial capability level

## Campaign period:

- Launch ceremony will be held in early March, date and venue TBC.
- Financial education initiatives held by IFEC and stakeholders will be held from 1 to 31 March 2020.

# HKMM 2020 Promotion

HKMM website, together with the event calendar, as the flagship platform to be promoted via:

- **The Chin Family platforms:** Website and social media platforms
- **Stakeholder network:** Sharing, hyperlinking, hastaging and distribution through supporting organisations
- **Advertising:** Digital platforms and KOLs
- **Word of mouth:** Ambassadors and friends of The Chin Family
- **Direct partnerships:** Events and publicity by TV, radio, print and/or online media

**Social media hashtags for HKMM 2020 e.g.**

#hkmoneymonth2020

#takeaction

## Why take part in HKMM 2020?

- Be part of this territory-wide annual financial education campaign endorsed by the Government and the four financial regulators
- Showcase your organisation's financial education efforts
- Increase the reach and impact of financial education initiatives of your organisation through collaboration
- Your organisation's initiatives may be promoted through advertising and social media
- Be acknowledged as a supporter on HKMM 2020 website
- Advocate corporate social responsibility
- Promote financial well-being and financial literacy of Hong Kong people and support Hong Kong's position as an international financial centre

## Support from IFEC

- Promote HKMM 2020 initiatives through advertising and IFEC's own platforms
- Organise HKMM 2020 launch ceremony with participation from the government, regulators and supporters
- Coordinate supporters in organising financial education initiatives during HKMM 2020
- Match organisations who are looking to collaborate (e.g. financial support, sponsorship in kind, venue, speakers and volunteers, etc.) with others to run financial education initiatives during HKMM 2020
- Feature activities and initiatives on [www.moneymonth.hk](http://www.moneymonth.hk) and link references back to supporters' websites

# How did IFEC promote HKMM 2019?

We promoted HKMM 2019 through advertising and IFEC's own platforms

- News: 57 press and social media reports
- Social media: 20 feeds on The Chin Family Facebook page; and 11K+ likes, 180+ comments, 800+ shares, 8.3K link clicks. KOLs were engaged in promotion.
- Collaterals: 100,000+ sets of Smart Saving Kit were distributed to parents and schools.
- Website: A dedicated site gained 93,000+ page views and 56,000 visitors



Jim Yan – personal tips on money management



Chu Fun – personal tips on money management



"Interesting design"



## 2019年3月1日 香港財經 投委會推出香港理財月2019

投資者及理財教育委員會今日推出全港性理財教育活動「香港理財月2019」，向市民推廣良好理財規劃和財務健康的重要性。

活動將為學生、在職人士、投資者、退休人士及弱勢社群提供商場活動、財務策劃研討會、投資講座及網上學習機會等。

財經事務及庫務局局長劉怡翔表示，面對中美貿易摩擦、英國脫歐以及全球經濟下行風險增加這些複雜的外圍因素，金融市場不免會有所波動，令投資變得更具挑戰，更需透過投資者教育，防範未然。



Full Article:

香港財經局今日(3月1日)推出全港性理財教育活動「香港理財月2019」。

2019年「香港理財月」活動旨在提高市民對理財的興趣，並提供有關理財的資訊和工具。活動將包括一系列商場活動、研討會、講座及網上學習機會。

財經事務及庫務局局長劉怡翔表示，面對中美貿易摩擦、英國脫歐以及全球經濟下行風險增加這些複雜的外圍因素，金融市場不免會有所波動，令投資變得更具挑戰，更需透過投資者教育，防範未然。



【香港理財月活動先鋒】  
香港理財月活動先鋒，為市民提供有關理財的資訊和工具。活動將包括一系列商場活動、研討會、講座及網上學習機會。

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# How can your organisation get involved?

- Run and/or fund financial education initiatives in the month of March 2020, based on the Hong Kong Financial Competency Framework, covering any of following topics:
  - Money & banking
  - Saving & investing
  - Consumer rights & responsibilities
  - Protection & risks
  - Income & taxation
  - Spending & credit
  - Financial planning
- Collaborate with other organisations (e.g. event organisers, subject experts, educators, non-profit organisations, funders, etc.) to jointly deliver financial education initiatives through providing resources available to your organisation
  - Sponsorship
  - Venue
  - Speakers
  - Volunteers
- Help promote HKMM 2020 through your organisation's channels and/or personal networks. The IFEC will provide a set of HKMM assets featuring logos, printed and digital collaterals, etc. for your use

# Examples of segment-focused financial education initiatives

**Staff Workshops**

**Fun fair for  
Family**

**Social Media Challenge**

**Social Media Broadcast  
against Scams**

**Reach out to  
Domestic Helpers**

**Seminars for Disabled**

**Slogan  
Competitions**



**Parents & Kids  
workshops**

**Videos for  
Young Adults**

**Dollars & Sense  
Contest for Youths**

**Retirees  
Learning about Fintech**

**Good Money Practices  
for Working Adults**

**Sharing photos of  
Financial Dreams**

**Talks on  
Managing Investment**

**Events competition for  
Tertiary Students**

**Topical Website  
Contents**

**Tips on  
Responsible Borrowing**

**Featured Radio  
Programme**

**Article series  
in magazines & newspapers**

# Examples of financial education initiatives in 2019



## Family Variety Show

Commercial Radio Hong Kong & IFEC



## Insurance education seminar

Insurance Authority & IFEC,  
supported by Metro Radio



## Investor Education Seminar

ACCA, CFAI, HKSFA, IFEC & HKU Space



## Bank visits for secondary school teachers and students

Citibank & Bank of East Asia



## The Stock Trading Guru Board Game Competition

Hong Kong Association for Business  
Education and IFEC with support of  
Education Bureau

# Examples of financial education initiatives in 2019



**Workshop for mentally disabled secondary students**  
The Boys' & Girls' Clubs Association of Hong Kong



**Workshop for drug addicts**  
Hong Kong Family Welfare Society



**Career experiential workshop for secondary students**  
St James' Settlement and Child Development Fund



**Seminar on legacy planning**  
Institute of Active Ageing of The Hong Kong Polytechnic University and IFEC



**Leaflets for migrant domestic workers**  
Enrich



**Seminar on Reverse Mortgage and Enduring Power of Attorney**  
Happy Retired, sponsored by Noble Apex



# Promotion support from stakeholders in the past



## Contact

If you have any questions, please feel free to  
contact Mr Vincent Poon  
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# Thank you!

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