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FPAM MEDIA STATEMENT

16 Organisations Win FPAM's Financial Planning Leadership Awards

Kuala Lumpur, Malaysia – 26 November 2025 - The Financial Planning Association of Malaysia (FPAM) celebrated its Financial Planning Leadership Awards, recognising 16 exceptional organisations that are transforming financial education and empowering Malaysians to build lasting financial security. The prestigious awards honoured Charter and Corporate members across three tiers—Platinum, Gold, and Silver—celebrating organisations that have distinguished themselves through their dedication to elevating the profession and creating meaningful change in communities nationwide.

"What sets these organisations apart goes beyond their business successes. Their distinction lies in their commitment to something larger than themselves," said Alvin Tan Chin Cherng, CFP®, President of FPAM. "They understand that their actions shape the reputation of our industry and directly influence how Malaysians perceive and experience financial services. Every client interaction, every ethical decision, every investment in professional development contributes to building public trust. And trust is our most valuable asset."

The winners have pioneered new methodologies for client engagement, established training programmes that set industry benchmarks, and forged partnerships that expand access to quality financial planning services. Their impact extends far beyond their immediate client base through community outreach programmes, thought leadership initiatives, and commitment to diversity and inclusion.

The awards evaluated organisations based on 11 comprehensive criteria spanning 1 January 2023 to 31 December 2024, including professional excellence, digital innovation, community engagement, and support for vulnerable groups. Recognition tiers were determined by criteria met: Platinum for 7 or more, Gold for 5, and Silver for 3.

Thirteen organisations achieved Platinum distinction, while one organisation received the Gold Award and two earned Silver Awards:

Platinum Award

Charter Members:

- AFFIN Bank Berhad
- Hong Leong Bank
- Kenanga Investors Berhad

- Maybank Group
- Principal Asset Management

Corporate Members:

- Advisonomics
- Cheng & Co Group
- Coreplus Advisory
- FA Advisory
- Finwealth Management
- Phillip Mutual Berhad
- Wealth Vantage Advisory
- Whitman Independent Advisors

Gold Award

Corporate Members:

- YES Financial Berhad

Silver Award

Corporate Members:

- KoiZai Limited
- Uno Advisers

From groundbreaking digital platforms that democratise financial knowledge to community programmes serving vulnerable populations, the award recipients demonstrate how organisations can successfully balance commercial success with meaningful service to society. "The legacy these firms are building will influence our profession for years to come," added Tan. "Their innovative practices and community engagement efforts create a foundation upon which future generations of financial planning organisations can build."

The Financial Planning Leadership Awards represent more than recognition—they celebrate organisations whose commitment extends beyond profit margins to encompass social responsibility and professional development, helping Malaysians of all backgrounds navigate increasingly complex financial landscapes and build secure, confident financial futures.

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Financial Planning Association Malaysia (FPAM) is a non-profit organisation with a vision and mission to establish the global CFP® mark as the leading symbol of excellence for personal financial planning and to promote its recognition as a profession to benefit all Malaysians. We also strive to promote



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Financial Literacy across the breath of the population of Malaysia. For more information, please visit our website at www.fpam.org.my

 *Celebrating 25 Years of Envisioning Financial Futures*