




CFP^{CM} Certification

RENEWAL FORM

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CFP^{CM} Certificant No.: **CFPHK**

Date Joined: _____

CFP^{CM} Certification Renewal Application Form

IMPORTANT NOTES

1. CFP certifiants are required to renew their certification annually in order to continue using the CFP marks. To renew their certification, CFP certifiants must maintain technical competence and fulfill ethical obligations. They must complete a minimum of 15 credits of continuing education (CE) every year. Certifiants who received their certification after 1 July 2011 may complete a minimum of 7.5 CE credits to meet the renewal requirement for the first year (not applicable to new certifiants upgraded from Associate (Graduate) member or Associate Personal Financial Planner (APFP)).
2. In addition to the annual continuing education requirement, all CFP certifiants voluntarily disclose any public, civil, criminal or disciplinary actions that may have been taken against them during the previous year as part of the renewal process.
3. The one year certification period is by calendar year, from 1 January to 31 December. **Deadline for submitting the complete renewal application for year 2012: 31 December 2011.**
4. Completed application form with appropriate annual fee must be received by IFPHK on or before the deadline on 31 December. If a CFP certificant has failed to submit the renewal application by 31 December, a late fee of HK\$200 will be added to the regular annual fee for completed application submitted between 1 January and the last day of February in the following year.
5. If a complete application is not received by the end of February in the following year, the CFP certificant will be considered as not having satisfied the renewal requirements and the certification will automatically be suspended. The list of "temporarily suspended CFP certifiants" will be posted on IFPHK's website and published in our official publication for public's information. IFPHK may take any other actions it deems appropriate.
6. Please note that the complete application must be submitted in person or by mail to the office:

**Operations Department
Institute of Financial Planners of Hong Kong
13/F, Causeway Bay Plaza 2,
463 – 483 Lockhart Road, Hong Kong
“Re: CFP Certification Renewal”**

7. All applications are subject to review and approval by IFPHK. IFPHK endeavours to notify the result of the application within six to eight weeks' time. If you have any concerns, issues or further queries regarding the CFP certification renewal application, please contact us at 2982 7888 or by email: cert@ifphk.org.

For Official Use Only					
Date Received	Data Entry	Completed with all info	Payment	Evaluation	Approval (subject to audit)
		<input type="checkbox"/> Yes <input type="checkbox"/> No	To F&A on: Confirmed on:		
Follow up/ Remarks:					

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CFP CERTIFICATION RENEWAL APPLICATION FORM FOR YEAR 2012

SECTION ONE: PERSONAL PROFILE

Note: if you have examination record(s) kept in IFPHK, related personal data in your examination record(s) will also be updated with the information provided in this form.



CFP^{CM} Certificant No.: _____ **CFPHK**

Title:* Dr/Mr/Mrs/Ms/Miss **Name:** _____ (Eng) _____ (Chinese)
(as printed on your ID card/passport)

HKID/ Passport* No.: _____

Professional Qualification: CFA / CGA / CMA / ChFC / CLU / FCII / FSA / FCPA / CPA / Doctoral Degree / Others* _____

Email Address: _____
(for sending acknowledgement of receipt if applicable)

* circle where appropriate

Contact Details

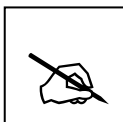
Correspondence Address: _____ _____ _____
Tel: _____ (Mobile) _____ (Office) _____ (Home)
Fax: _____ Email Address: _____ <i>(if different from above)</i>

Details of Highest Level of Education Attained

Name of Education Institution: _____
Qualification Attained: _____

CFP CERTIFICATION RENEWAL APPLICATION FORM FOR YEAR 2012

Employment Details



Current Employer: _____

#Company Group of Current Employer: C
 (Please refer to the Employer Code below and choose the group that your current employer belongs to.)

Current Position: _____

#Industry of Employment: I
 (Please refer to the Industry Code below and choose the one that best describes the industry you are serving, e.g. if you are serving as an accountant in a retail bank, you should choose I1.)

Years of Financial Planning Work Experience: _____

Earnings in the Past Year (Please refer to the Earnings Code below): E

Compulsory field to be filled in for statistical purpose

Employer Code:

C1 AIA	C9 DBS Bank	C17 Standard Chartered Bank
C2 AXA	C10 Hang Seng Bank	C18 UBS
C3 Bank of Communications	C11 HSBC	C19 Wing Lung Bank
C4 Bank of East Asia	C12 ING Group	C20 Zurich Insurance Group
C5 Bank of China	C13 Manulife	C22 Sun Life Hong Kong Limited
C6 China Construction Bank	C14 Nanyang Commercial Bank	C21 Others
C7 Citibank	C15 Prudential	
C8 Convoy	C16 Shanghai Commercial Bank	

Industry Code:

I 1 Retail Banking	I 6 Independent Financial Advisor	I 11 Academia
I 2 Private Banking	I 7 Asset Management	I 12 Real Estate Sector
I 3 Investment Banking	I 8 Securities Brokerage	I 13 Others
I 4 Life Insurance	I 9 Legal Practice	
I 5 General Insurance	I 10 Accounting Practice	

Earnings Code:

E 1 Less than HK\$200,000	E 4 HK\$600,000 – less than HK\$800,000
E 2 HK\$200,000 – less than HK\$400,000	E 5 HK\$800,000 – less than HK\$1,000,000
E 3 HK\$400,000 – less than HK\$600,000	E 6 HK\$ 1 million or above

CFP CERTIFICATION RENEWAL APPLICATION FORM FOR YEAR 2012

Currently Held Statutory Licences



<u>SFC</u>	
<input type="checkbox"/> Type 1 Dealing in Securities	<input type="checkbox"/> Type 6 Advising on Corporate Finance
<input type="checkbox"/> Type 2 Dealing in Futures Contracts	<input type="checkbox"/> Type 7 Providing Automated Trading Services
<input type="checkbox"/> Type 3 Leveraged Foreign Exchange Trading	<input type="checkbox"/> Type 8 Securities Margin Financing
<input type="checkbox"/> Type 4 Advising on Securities	<input type="checkbox"/> Type 9 Asset Management
<input type="checkbox"/> Type 5 Advising on Futures Contracts	<input type="checkbox"/> Type 10 Providing Credit Rating Services
<u>IA</u>	
<input type="checkbox"/> Individual Agent	<input type="checkbox"/> Technical Representative of Insurance Agent
<input type="checkbox"/> Responsible Officer of Insurance Agency	
<u>Others</u>	
<input type="checkbox"/> MPF Intermediaries	<input type="checkbox"/> CIB
<input type="checkbox"/> PIBA	

Preference



1. To help save the environment, will you consider online renewal with IFPHK sending you a reminder notice?

Yes (IFPHK will send you a reminder notice for online renewal)
 No (IFPHK will send you the printed renewal pack with enclosed renewal form)

2. Do you consider receiving online publications rather than printed publications from IFPHK?

Yes (Please skip Question 3) No

3. If you do not want to receive the regular email "IFPHK Weekly Alert" from IFPHK, please "tick" here.
(Please do not tick here if your answer to question 2 is "yes" since most of the online publications from IFPHK are sent via the "IFPHK Weekly Alert")

4. IFPHK always strives to communicate with you in bilingual format (English and Chinese). If a bilingual format is not available, please indicate your preferred language of communication*:

English Chinese

* Note: IFPHK will take into consideration your preferred language whenever possible. However, certain publications/communications channel may not be translated to the preferred language due to copyright, legal or other reasons.

CFP CERTIFICATION RENEWAL APPLICATION FORM FOR YEAR 2012

SECTION TWO: MARK USAGE & CONTINUING EDUCATION DECLARATION

This is to declare that

- a) I have read and agree to follow the "Guide to Use of the CFP^{CM} Marks" which is available at the CFP^{CM} Certificant Manual; and
- b) I understand the CE requirements and obligations of a CERTIFIED FINANCIAL PLANNER^{CM} certificant, and an ordinary member of IFPHK (if applicable) as specified by IFPHK

and that I have met the obligations of the proper usage of the CFP certification marks and CE requirement for 2012 certification renewal.



Signature: _____

Date: _____

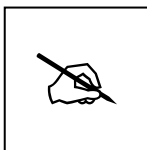
NOTES:

1. Certificants have to strictly follow the "Guide to Use of the CFP^{CM} Marks" in featuring the CFP marks in printed and online communications including business cards, letterhead, advertising, personal promotional literature, signage and Web sites.
2. Certificants are required to maintain attendance records and supporting documentary evidence of CE programs for a period of up to 3 years.
3. All filings and records of CE programs are subject to audit by IFPHK where certificants will be required to provide all attendance records and supporting documentary evidence upon request. Failure to provide the evidence may lead to disciplinary action including but not limited to the relinquishment of the CFP certification.
4. Please do not submit any CE attendance records and supporting documentary evidence with this application form unless specifically requested to do so.
5. Certificants who have not signed the Mark Usage & Continuing Education Declaration or have not acquired enough CE credits are considered non-compliance with the renewal requirements. Their certification and rights to use the CFP marks will be suspended until they have successfully renewed their certification.
6. Certificants who cannot comply with the renewal requirements for health reasons or other circumstances beyond their control can submit a written request to IFPHK for consideration. Such requests must include an explanatory letter and all applicable supporting documentation. These exception cases will be considered by the Board of Directors on a case-by-case basis.

CFP CERTIFICATION RENEWAL APPLICATION FORM FOR YEAR 2012

SECTION THREE: DECLARATION & AGREEMENT

Period of Declaration: 1 January 2011 to date of application for renewal



- | | Yes | No |
|---|--------------------------|--------------------------|
| 1. Have you ever been convicted of any offence other than a minor traffic or littering offence in Hong Kong or elsewhere?
If "yes", please specify: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Are you or have you ever been declared bankrupt in Hong Kong or elsewhere?
If "yes", please specify: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Have you ever been refused membership of a statutory body or other professional body in respect of your professional capacity in Hong Kong or elsewhere?
If "yes", please specify: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Have you ever been refused professional indemnity insurance in Hong Kong or elsewhere?
If "yes", please specify: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Have you ever been subject to disciplinary proceedings or expelled by a statutory body or other professional body in respect of your professional capacity in Hong Kong or elsewhere?
If "yes", please specify: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Are you aware of any other matters that may impact on IFPHK's consideration of your application?
If "yes", please specify: _____ | <input type="checkbox"/> | <input type="checkbox"/> |

Note: If you have answered "YES" to any of the above questions, please attach all relevant documents relating to the matters at issue.

Terms and Conditions of Re-certification

1. I understand and agree to comply with all conditions, requirements, policies and procedures for the CFP Certification Program established by IFPHK as may be amended from time to time. I understand that such conditions, requirements, policies and procedures consist of all materials relevant to the CFP Certification Program including but not limited to IFPHK's Memorandum and Article of Association, IFPHK's Disciplinary Rules and Procedures, and IFPHK's Code of Ethics and Professional Responsibility and any conditions, requirements, policies and procedures that IFPHK may establish and/or amend from time to time.
2. I understand and agree that in consideration of IFPHK granting me the rights to use the *CFP Marks*, I shall observe and adhere to the *Guide to Use of the CFP^{CM} Marks* and shall indemnify IFPHK and FPSB for all liability, loss and damages, costs, legal costs, professional costs and expenses of whatsoever nature incurred or suffered by FPSB or IFPHK whether direct or consequential arising out of, or as a result of, my, or my permitting the, misuse of the Marks otherwise than strictly in accordance with the *Guide to Use of the CFP^{CM} Marks*.
3. I understand and agree that IFPHK may enforce the conditions, requirements, policies and procedures as mentioned in (1) above against me and may reject, suspend or terminate my right to use the CFP Marks (if granted) at any time, for my failure to satisfactorily meet any such conditions, requirements, policies and procedures.
4. I understand that the rights to use the *CFP Marks* are granted by IFPHK to me personally. I understand that my CFP certification is limited to a fixed period of time. At the end of the period, if my certification is not renewed, my certification expires immediately and any right to use the *CFP Marks* will terminate upon expiration of the certification. If I fail to comply with certification renewal requirements, I agree to cease use of the *CFP Marks* immediately. I understand that the IFPHK may relinquish any rights I have in the use of *CFP Marks* if I fail to maintain certification status.
5. I understand that upon successful application for re-certification with the IFPHK, the IFPHK will grant me a complimentary ordinary membership under IFPHK's Articles of Association. I understand that I may withdraw my IFPHK membership by sending a written request to the Operations Department of IFPHK.

CFP CERTIFICATION RENEWAL APPLICATION FORM FOR YEAR 2012

Personal Data Agreement

1. I explicitly consent that any personal information (personal data) from time to time collected or held by IFPHK (whether contained in this application or obtained otherwise) is provided and may be held, used, processed and/or disclosed (i) in accordance with and for the purpose outlined in the Data Privacy Statement herein, and/or (ii) to permit and enable IFPHK to:
 - a. fully and fairly process my application,
 - b. disclose any personal data where IFPHK has an obligation to make such disclosure under the requirements of any law binding on IFPHK,
 - c. disclose to the public my certification status, date of certification, professional standing and history of disciplinary actions as a CFP certificant and the date of my ceasing to be a CFP certificant (if applicable),
 - d. use my personal data to compile statistics and analyse the results wholly for use within IFPHK,
 - e. disclose my personal data to Financial Planning Standards Board Ltd. (FPSB) and its affiliate members for statistical purpose or certification / cross-border certification related purpose.
2. I understand that I may refuse to provide personal data as requested in the application or otherwise, but such refusal, or the provision of inaccurate personal data may result in IFPHK being unable to or refusing to process this application.
3. I agree that IFPHK may disclose my CFP certification status to my employer (being the entity with which I have an employment, agency or similar contractual obligation, and/or the holding companies, subsidiary companies or associated members of such entity) [that is kept in the IFPHK record] upon their request.
 Yes No
4. I understand that I have the right to check whether IFPHK holds personal data about me and that, if so, I have a right of access to my personal data. I can request IFPHK to correct any inaccurate personal data and if I need to obtain a copy of my personal data or have it corrected, I can write to the Operations Department of IFPHK. I understand that IFPHK is permitted by law to charge a reasonable fee for the processing of any data access request.

I understand and agree to the Terms and Conditions of Re-certification and the above Personal Data Agreement. Also, I declare that the information contained in this application is truthful and complete, and I agree to notify IFPHK of any material changes to my responses to any of the questions in this application, including my contact details. I understand and agree that IFPHK may investigate the statements I have made with respect to this application, and that I may be subject to disciplinary actions for any misrepresentation (whether fraudulent or otherwise) in this application.

Signature: _____

Date: _____

CFP CERTIFICATION RENEWAL APPLICATION FORM FOR YEAR 2012

SECTION FOUR: PROCESS AND PAYMENT DETAILS

Annual certification fee for Year 2012: HK\$2,000 (in which, 15% will be contributed to IFPHK capital fund)

For late application submitted between 1 January 2012 and 29 February 2012, a late fee of HK\$200 will be charged.



Renewal application submitted by 31/12/2011 Pay amount: HK\$2,000	<input type="checkbox"/>	Renewal application submitted between 1/1/2012 and 29/2/2012 Pay amount: HK\$2,200	<input type="checkbox"/>
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Payment by cheque to: "IFPHK Ltd." (Bank: _____ Cheque No.: _____)

Payment by credit card: VISA MasterCard

Card No.: -

Card Expiry Date: /

Cardholder's Name: _____

Cardholder's Signature: _____ Date: _____

For Official Use Only		
CFP Certificant No.	Name of CFP Certificant	Remarks
CFPHK		

ACKNOWLEDGEMENT OF RECEIPT

For Renewal Application Form Submitted by Mail or by Courier

The acknowledgement of receipt will be sent to you via email to the email address provided at Section One: Personal Profile of this renewal form. If email address is not provided, there will be no acknowledgement sent.



ACKNOWLEDGEMENT OF RECEIPT

For Renewal Application Form Submitted in Person



To: _____ (Please fill in your full name)

We hereby acknowledge the receipt of your CFP^{CM} Certification Renewal Application Form for Year 2012.

Please note that we will begin processing your application. You will be promptly notified of the results once your application has been approved.

For your information, the processing time for this application will be around 6 to 8 weeks. During this period, IFPHK may contact you regarding supplementary information to ensure a smooth process.

If you have any concerns, issues or further queries regarding the CFP certification renewal application, please contact us by email at cert@ifphk.org.

Thank you for your continual support of the highly-regarded CFP^{CM} Certification.

Institute of Financial Planners of Hong Kong

Date



Please fill out this questionnaire to help us better understand your needs. The questionnaire may be returned together with the renewal application.

請填妥這份問卷，讓我們更瞭解您的需要。您可把問卷連同續期申請表格一併提交。

(A) Economy and Industry Outlook 經濟及行業前景

1. Are you confident that the economy is getting better within next year?
您有沒有信心未來一年的經濟會更好？
 - a) Hong Kong economy 香港經濟
 - Confident 有信心
 - Not Confident 沒有信心
 - b) Global economy 全球經濟
 - Confident 有信心
 - Not Confident 沒有信心
2. Please rank the following items in order of importance to the financial planning industry (from 1 to 5 where 1 is the most important)
請依優先次序排出最影響財務策劃行業的地方（由 1 至 5，1 為影響最大）。
 - Ageing population and retirement planning 人口老化及退休計劃
 - Increased regulatory and compliance requirements 監管條例及要求之增加
 - Inflation 通漲
 - Market volatility and economics downturn 市場動盪及經濟轉差
 - Widen wealth gap 貧富的差距增大

(B) Financial Planning Career 財務策劃職業

1. How satisfied are you as a financial planner?
您對成爲一位財務策劃師有多滿意？
 - Very satisfied 非常滿意
 - Satisfied 滿意
 - Somewhat satisfied 有點滿意
 - Somewhat dissatisfied 有點不滿意
 - Dissatisfied 不滿意
 - Very dissatisfied 非常不滿意
 - Not applicable 不適用 (please jump to Part D) (請跳至 D 部)
2. Choose the aspect(s) of financial planning career that you are satisfied with (3 aspects at most).
請選擇您滿意財務策劃這職業的地方（最多三項）。
 - Career prospect 工作前景
 - Helping clients in achieving their financial goals 協助客戶達至其財務目標
 - Income level 收入水平
 - Interacting with clients 與客戶接觸
 - Professional recognition 專業身份的認同
 - Solving client problems 解決客戶的問題



INSTITUTE OF FINANCIAL PLANNERS OF HONG KONG

13/F, Causeway Bay Plaza 2, 463-483 Lockhart Road, Hong Kong

Tel (852) 2982 7888

Fax: (852) 2982 7777

Website: www.ifphk.org

E mail: info@ifphk.org

香港財務策劃師學會

香港 銅鑼灣 駱克道 463-483 號銅鑼灣廣場 二期 13 樓

電話: (852) 2982 7888

傳真: (852) 2982 7777

網址: www.ifphk.org

電郵: info@ifphk.org

3. Choose the most important factor that affected your success as a financial planner.

請選擇最影響您成爲一位成功的財務策劃師的因素。

- Communication skills 溝通技巧
- Diversified clientele 多元化的顧客
- Education background 教育背景
- Having the CFP certification 獲得 CFP 資格認證
- Specialization 專業知識
- Training and continuing education 培訓及持續進修
- Working experience 工作經驗

(C) Financial Planning Practice 財務策劃實踐

1. What you consider as the most valuable services to your clients?

您認爲客戶最重視那一種服務？

- Advising your clients to make difficult decisions about spending, saving and investing
在客戶作出有關投資、儲蓄及消費的困難決定時提供建議
- Helping your client to maintain perspective 助客戶維持觀點
- Having sufficient income for retirement 有足夠收入供退休用
- Protecting portfolio principal 保本
- Reducing portfolio volatility 減少投資組合的波動性

2. Have you prepared detailed financial plan for your clients?

您會否爲客戶提供詳細的財務計劃？

- Every time 每次都有
- Always 經常
- Sometimes 有時
- Not often 不經常
- Never 從不

3. Choose the area(s) that your typical clients are most knowledgeable (3 areas at most).

請選擇您客戶最認識的地方（最多三項）。

- Basic budgeting 制定預算
- Estate planning 遺產安排
- Financial goal setting 制定財務目標
- Insurance 保險
- Investment 投資
- Retirement planning 退休安排
- Tax planning 稅務安排
- Others, please specify 其他，請指出： _____

4. Choose the area(s) that your typical clients are most concerned (3 areas at most).

請選擇您客戶最關注的地方（最多三項）。

- Basic money management 金錢管理
- Estate planning 遺產安排
- Funding education 教育經費
- Health care costs 保健及醫療開支
- Investment returns 投資回報
- Managing debts 負債管理
- Retirement funding 退休資金
- Tax burden 稅務負擔
- Wealth creation 財富增長
- Others, please specify 其他，請指出： _____

5. Are you serving Mainland Chinese clients?
您有沒有國內的客戶？
- Yes 有
 No 沒有 (please jump to Part D) (請跳至 D 部)
6. What is the percentage of your total number of clients are Mainland Chinese?
國內客戶佔您所有客戶多少百分比？
- 10% or below 10%或以下
 11% to 30% 11%至 30%
 31% to 50% 31%至 50%
 51% to 70% 51%至 70%
 71% to 90% 71%至 90%
 91% or above 91%或以上
7. Choose the area(s) of products/services that you are providing to your Mainland Chinese clients (3 areas at most).
請選擇您提供予國內客戶的服務（最多三項）。
- Education fund 教育基金
 Estate planning 遺產安排
 Investment 投資
 Life insurance 人壽保險
 Medical insurance 醫療保險
 Retirement planning 退休安排
 Tax planning 稅務安排
 Trust 信託
 Others, please specify 其他，請指出： _____

(D) Continuing Education 持續進修

1. How frequent do you attend the Continuing Education (CE) courses offered by IFPHK?
您多久會參加香港財務策劃師學會舉辦的持續進修課程？
- Once per year 一年一次
 Twice per year 一年兩次
 Three times per year 一年三次
 Four times or above per year 一年四次或以上
 Never 從不
2. IFPHK is planning to implement a mandatory CE requirement of 2 hours training on compliance and regulations for all CFP certificants from 2012 or 2013. What is your preferred delivery mode of these training courses?
香港財務策劃師學會計劃自 2012 或 2013 年開始，實施必修課程要求，規定 CFP 持證人必須每年修讀兩小時有關合規及法規的持續進修課程。您會選擇哪種授課模式？
- Online program 網上學習形式
 Taught program 面授形式
 Mixed mode of online program and taught program 以上兩種形式混合

(E) Earnings 收入

1. Please fill in your earnings prior to and after CFP certification according to the codes below.
請根據下列的收入編號，填寫您在取得 CFP 資格認證之前及之後的收入。
- Earnings in the year prior to certification 認證前那一年的年薪 : _____ **E**
 - Earnings in the year after certification 認證後那一年的年薪 : _____ **E**
- | | | |
|----|---------------------------|------------------------|
| E1 | Less than HK\$200,000 | 少於港幣 200,000 |
| E2 | HK\$200,000 – HK\$399,999 | 港幣 200,000 至港幣 399,999 |
| E3 | HK\$400,000 – HK\$599,999 | 港幣 400,000 至港幣 599,999 |
| E4 | HK\$600,000 – HK\$799,999 | 港幣 600,000 至港幣 799,999 |
| E5 | HK\$800,000 – HK\$999,999 | 港幣 800,000 至港幣 999,999 |
| E6 | HK\$1,000,000 or above | 港幣 1,000,000 或以上 |

2. Please select the calculation method of your earnings.

請選擇您收入之計算方法。

- Commission only 只有佣金
- Salary only 只有薪金
- Service fee only 只有服務收費
- Salary and commission 薪金及佣金
- Salary and service fee 薪金及服務收費
- Service fee and commission 服務收費及佣金
- Salary, service fee and commission 薪金、服務收費及佣金

(F) Other Questions (You may choose more than one answer to each question) 其他問題 (每題均可選擇多於一項)

1. Which newspaper(s) do you read daily?

您日常會閱讀以下哪份報章?

- AM730
- Apple Daily 蘋果日報
- Headline Daily 頭條日報
- Hong Kong Economic Times 香港經濟日報
- Hong Kong Economic Journal 信報
- Metro Daily 都市日報
- Ming Pao Daily 明報
- Oriental Daily News 東方日報
- Sing Tao Daily 星島日報
- South China Morning Post 南華早報
- The Sun 太陽報

2. Which website(s) will you visit to get finance related news?

您會瀏覽以下哪個網頁來取得有關財經的資訊?

- Bloomberg
- ET net 經濟通
- Finance Asia
- Finet 財華網
- Metro Finance 新城財經網
- Ming Pao Finance 明報財經網
- Professional Advisors 專業理財
- Quamnet 華富財經
- Yahoo! Finance Yahoo! 財經

3. What kind of market information would you like IFPHK provides to you in the future?

您希望 IFPHK 在日後為您提供以下那些市場資訊?

- Economic data and statistics report 經濟數據及分析報告
- Financial planning practice 財務策劃的實踐
- International development in financial planning 財務策劃於國際的發展資訊
- Investment and insurance product development 投資及保險產品的發展資訊
- Market trends in Hong Kong 香港的市場趨勢
- Regulatory and compliance update 監管及法規事宜的最新資訊

(G) Personal Particulars (Optional) 個人資料 (可選擇不填寫)

CFP Certificant No. CFP 持證人編號 : _____

Name 姓名 : _____

Signature 簽署 : _____

Date 日期 : _____