



CORPORATE MEMBERSHIP APPLICATION FORM

Introduction of IFPHK

IFPHK was established in June 2000 as a non-profit organization for the fast-growing financial industry. It aims to be recognized in the region as the premier professional body representing financial planners that uphold the highest standards to benefit the public.

The Institute is the sole licensing body in Hong Kong authorized by Financial Planning Standards Board Limited to grant the much-coveted and internationally-recognized CFP^{CM} certification and AFPTM certification to qualified financial planning professionals in Hong Kong and Macau.

It represents more than 10,000 financial planning practitioners in Hong Kong from such diverse professional backgrounds as banking, insurance, independent financial advisory, stockbroking, accounting, and legal services.

Currently there are more than 133,000 CFP certificants in 24 countries/regions; the majority of these professionals are in the U.S., Canada, China, Australia and Japan, with more than 4,400 CFP certificants in Hong Kong.

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List of Founding Members (in alphabetical order)

ACE Life Insurance Company Limited
Ageas Insurance Company (Asia) Limited
Alliance Bernstein Hong Kong Limited
Altruist Financial Group Limited
American Express Bank Limited
American International Assurance Company (Bermuda) Limited
AXA China Region Insurance Company Limited
Bank of China (Hong Kong) Limited
BNP Paribas Private Bank
Charles Schwab Hong Kong Limited
China Construction Bank (Asia) Corporation Ltd.
Citibank, N.A., Hong Kong
DBS Bank (Hong Kong) Limited
Fidelity Investments Management (Hong Kong) Limited
Franklin Templeton Investments (Asia) Limited
General Agents and Managers Association of Hong Kong Limited
Hang Seng Bank Limited
INVESCO Hong Kong Limited
Manulife (International) Limited
MLC (Hong Kong) Limited
Morgan Stanley Dean Witter Asia Limited
Pegasus Financial Services Limited
Royal Skandia Life Assurance Limited
Sun Life Financial (Hong Kong) Limited
T G Holborn (HK) Limited
The Hongkong and Shanghai Banking Corporation Limited
The Life Underwriters Association of Hong Kong Limited
The Prudential Assurance Company Limited
UBS AG
Zurich Insurance Group (Hong Kong)

IFPHK Corporate Membership

Corporate Members are organizations that are engaged in the financial planning or financial services industry in Hong Kong. Any corporations involved with financial planning services or interested in expanding their services in financial planning are welcome to join IFPHK.

Corporate Membership Benefits

As a corporate member of IFPHK, your company will enjoy access to a combination of opportunities and advantages that are designed to improve the professionalism of your practitioners, illustrate your commitment to financial planning excellence and open new doors to potential clients. There include:

- Free copies of the Advisors Today and discounts for advertising in this journal.
- Special member's rate to attend forums, conferences and CE programs organized by IFPHK.
- Special packages for the upcoming consumer events.
- Special member's rate to attend International Conferences organized by sister associations of IFPHK around the world.
- Invitation to networking and social events organized for Corporate Members.
- A wide variety of sponsorship opportunities to IFPHK's events.
- Discounts for books in IFPHK bookshop.
- Preferential rates to organize tailored accredited in-house training in financial planning and wealth management.
- Discounts for advertising in special supplements in selected newspapers such as SCMP, Economic Times etc. when commissioned by IFPHK.
- Discounts for renting IFPHK's training facilities and meeting rooms.

How to Apply?

Submit the “Corporate Membership Application Form” together with a copy of your valid business registration, annual report or prospectus. Applicants will receive a membership certificate once the application has been processed. The application would take at least 8 weeks.

Membership Fee

One -year Membership

HK\$8,000

Two-year Membership

HK\$15,000

Reminder

- Members should inform IFPHK of any changes in company profile.
- IFPHK reserves the right to make any alterations in regards to the policy, registration and benefits without prior notice.

For Office Use Only

Membership No.: _____

Date Received: _____

Date Approved: _____

The Institute of Financial Planners of Hong Kong

Corporate Membership Application Form

Company Profile

Company Name (English) _____

(Chinese) _____

Correspondence Address _____

Telephone (Main Line) _____ Fax (General) _____

Email (General)** _____ Website _____

Do you wish to hyperlink your company's website with the website of IFPHK? Yes No

Business Field: (Please "✓" as appropriate)

- | | |
|---|--|
| <input type="checkbox"/> I1 Retail Banking | <input type="checkbox"/> I8 Securities Brokerage |
| <input type="checkbox"/> I2 Private Banking | <input type="checkbox"/> I9 Legal Practice |
| <input type="checkbox"/> I3 Investment Banking | <input type="checkbox"/> I10 Accounting Practice |
| <input type="checkbox"/> I4 Life Insurance | <input type="checkbox"/> I11 Academia |
| <input type="checkbox"/> I5 General Insurance | <input type="checkbox"/> I12 Real Estate Sector |
| <input type="checkbox"/> I6 Independent Financial Advisor | <input type="checkbox"/> I13 Other |
| <input type="checkbox"/> I7 Asset Management | (please specify: _____) |

Contact Details

Chief Executive Officer / Managing Director

Name: Mr / Ms / Mrs _____ Position: _____

Email**: _____ Direct Line: _____

Correspondence Address: _____

Secretary:

Name: Mr / Ms / Mrs _____ Position: _____

Email**: _____ Direct Line: _____

Contact Person (Contact point with IFPHK. Information from IFPHK will be sent to the contact person.)

Is Chief Executive Officer / Managing Director the contact person?

- Yes No (Please fill in the information below)

Contact Person: Mr / Ms / Mrs _____ Position: _____

Email**: _____ Direct Line: _____

Correspondence Address: _____

Head of Training / Business Development

Name: Mr / Ms / Mrs _____ Position: _____

Email**: _____ Direct Line: _____

Correspondence Address: _____

Contact Person for Training / Business Development related issues:

Name: Mr / Ms / Mrs _____ Position: _____

Email**: _____ Direct Line: _____

Head of Marketing / Communication / PR

Name: Mr / Ms / Mrs _____ Position: _____

Email**: _____ Direct Line: _____

Correspondence Address: _____

Contact Person for Marketing / Communication / PR related issues:

Name: Mr / Ms / Mrs _____ Position: _____

Email**: _____ Direct Line: _____

*** IFPHK will regularly communicate with you via email*

Membership Fee and Payment (Please "✓" as appropriate)

- HK\$8,000** One Year
- HK\$15,000** Two Years

Payment Method

Cheque (Bank: _____ Cheque No.: _____)

Credit Card

I authorize IFPHK Ltd. to debit HK\$ _____ from my credit card.

VISA MasterCard

Card No:

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Expiry Date: _____ / _____ (MM/YY) Name of Cardholder: _____

Signature of cardholder: _____ Date: _____

Applicant Statement

I declare that the statements made in this application are true and complete and authorize the investigation of all statements made herein on behalf of the company with respect to this application. If the company becomes the subject of any criminal offence or has been expelled from a professional society or institute, I undertake to provide additional relevant documents together with this form. We understand that IFPHK has the final decision to refuse any application and/or terminate the membership of any corporate member which practices are proved to have adversely affected the CFP^{CM} marks, the profession and/or the reputation or otherwise of IFPHK.

I agree to procure the corporation to comply with the IFPHK Code of Ethics and Professional Responsibilities, the provisions of the IFPHK's Memorandum and Article of Association and IFPHK's Disciplinary Rules and Regulations at all times in practice.

Authorized Signature: _____ Date: _____

Company Chop

Remarks

- All applications are subject to review and approval by the Member Services Committee and IFPHK may in its absolute discretion refuse to approve your membership application.
- Data submitted will be processed accordingly to Personal Data (Privacy) Ordinance.
- 15% of membership fee will be contributed to the IFPHK Capital Fund.
- The Member Services Committee endeavours to notify the result of the application with 8 weeks. If you wish to enquire the status of your application, please contact us at 2982 7888.

Please return the completed form together with appropriate fee to:

Marketing and Member Services Department, Institute of Financial Planners of Hong Kong
13/F, Causeway Bay Plaza 2, 463 - 483 Lockhart Road, Hong Kong

Enquiries: (Tel) 2982 7888 (Fax) 2982 7777 (Website) www.ifphk.org (Email) memberservices@ifphk.org