

Student (General) / University Student Membership

Application Form



The global symbol of excellence
in financial planning

VISION

The leading organization in Hong Kong for advancing professional financial planning standards and promoting the importance of financial planning.

MISSION

- To lead the development, promotion and enforcement of professional standards in financial planning industry.
- To raise professional standards of financial planners through internationally-recognized certification.
- To increase all external stakeholders' awareness of the importance of financial planning and advice from a financial planning professional.
- To influence corporate industry leaders to uphold high standards in financial planning industry.

BACKGROUND

IFPHK was formed in June 2000 as a non-profit self-regulatory organization for the fast-growing financial planning industry. We are the sole licensing body in Hong Kong authorized by Financial Planning Standards Board Limited to grant the much-coveted and internationally-recognized CFP certification to qualified financial planning professionals in Hong Kong.

IFPHK represents the financial planning practitioners in Hong Kong. It has over 10,000 members from such diverse professional backgrounds as banking, insurance, stockbroking, asset management, accounting, and legal services.

Student (General) / University Student Membership

- **Student (General) Members**
Individuals who are interested to learn more about the financial planning industry.
- **University Student Members**
Full time students studying bachelor degree programs (or above) at local universities.

MEMBERSHIP BENEFITS FOR STUDENT MEMBERS

- Access to IFPHK Student Corner, a unique portal for student members.
- Click <http://studentcorner.ifphk.org/> and you can...
 - ✓ Learn the latest member news
 - ✓ Gain valuable insights from IFPHK's "Advisors Today"
 - ✓ Connect with Education Providers on the latest course updates
- Special rate to attend continuing education activities including seminars, forums, conferences and luncheons.
- Invitation to attend complimentary examination preparatory information sessions.
- Invitation to attend social events and gatherings.
- Discount in purchasing IFPHK textbooks for the IFPHK Registered CFP^{CM} Certification Education Program.

IMPORTANT NOTES

1. Please return the completed form together with appropriate fee to:
Operations Department
Institute of Financial Planners of Hong Kong
Unit 2601, 26/F, Bank of East Asia Harbour View Centre,
56 Gloucester Road, Wanchai, Hong Kong
"Re: Application for Student Membership"
2. All applications are subject to review and IFPHK may in its absolute discretion refuse to approve your membership application.
3. All application fees are non-refundable.
4. If you have any concerns, issues or further queries regarding the Student (General) / University Student Membership application, please contact us by email at membership@ifphk.org.
5. IFPHK observes the requirements and provisions of the Personal Data (Privacy) Ordinance.

Section I: **Personal Particulars (Continue)**



Preference²

- 1. If you do not want to receive the regular email "IFPHK Weekly Alert" from IFPHK, please "tick" here.
- 2. 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 communication³
 - English
 - Chinese

Other Information

- 1. Which newspaper(s) do you read daily?
 - AM730
 - Apple Daily
 - Headline Daily
 - Hong Kong Economic Journal
 - Hong Kong Economic Times
 - Metro Daily
 - Ming Pao Daily
 - Oriental Daily News
 - Sing Tao Daily
 - South China Morning Post
 - The Sun
- 2. Which website(s) will you visit to get finance related news?
 - Bloomberg
 - ET net
 - Finance Asia
 - Finet
 - Metro Finance
 - Ming Pao Finance
 - Professional Advisors
 - Quamnet
 - Yahoo Finance
- 3. What kind of market information would you like IFPHK provides to you in the future?
 - Economic data and statistics report
 - Financial planning practice
 - International development in financial planning
 - Investment and insurance product development
 - Market trends in Hong Kong
 - Regulatory and compliance update

² Upon approval of your Student (General) / University Student membership application, IFPHK will follow the above preference to communicate with you, if feasible.

³ 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.

Section II: **Education**



For Student (General) Members

- Degree Holder
- Non-degree Holder

Name of Education Institution: _____

Highest Qualification Attained: _____ Year Attained: _____

For University Student Members

Name of Local University: _____

Program Studying: _____

Qualification

I declare that I possess the following qualification for the application of IFPHK Student (General) / University Student Membership.

(Please "✓" where appropriate)



Student (General) Membership

An individual who is interested to learn more about the financial planning industry.

University Student Membership

A full time student studying bachelor degree program (or above) at local university.

Data Protection 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 my membership status, date of award of membership, professional standing and history of disciplinary actions as a Student (General) / University Student Members and the date of my ceasing to be a Student (General) / University Student Member (if applicable) to the public,
- 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. and its affiliate members for statistical 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 membership 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 following address:

Institute of Financial Planners of Hong Kong
Unit 2601, 26th Floor, Bank of East Asia Harbour View Centre 56 Gloucester Road, Wanchai, Hong Kong

Application Statement

I declare that the statements made in this application are true and complete. I authorize the investigation of all statements made by me with respect to this application. If I have been convicted of any criminal offence or have been expelled from a professional society or institute, I will provide additional relevant documents together with this form.

I agree to be bound by the provisions of the IFPHK's Memorandum and Article of Association and subject to IFPHK's Disciplinary Rules and Procedures as a result of complaints. I agree to abide by IFPHK's Code of Ethics and Professional Responsibility at all times in practice.



Signature _____ Date _____

Section V: Payment Details

Payment enclosed:



Student (General) Membership: HK\$100

University Student Membership: HK\$50

Payment Method:

Payment by cheque to: "IFPHK Ltd." (Bank: _____ Cheque No.: _____)

Payment by credit card: VISA MasterCard

I authorize the Institute of Financial Planners of Hong Kong Limited to debit the above sum from my credit card account.

Card No. _____ - _____ - _____ - _____

Cardholder's Name _____ Card Expiry Date _____ (MM/YY)

Cardholder's Signature _____ Date _____

For Official Use only		
Name of applicant	Ref No.	Remarks

ACKNOWLEDGEMENT OF RECEIPT

For Student (General) / University Student Membership Application Form Submitted in Person

To: _____ (Please fill in your full name)

We hereby acknowledge the receipt of your Student (General) / University Student Membership Application Form.

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 Student (General) / University Student Membership application, please contact us by email at membership@ifphk.org.

Institute of Financial Planners of Hong Kong

Date