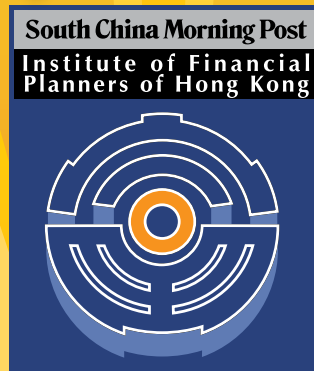


SCMP/IFPHK Financial Planner Awards 2010

University Student Category



**FINANCIAL
PLANNER
AWARDS**



Make your **DREAM** come true!

Internship, Scholarship, Recognition...

These are yours when you become a winner at the SCMP/IFPHK Financial Planner Awards.

Join the University Student Category, and let the entire financial services industry learn of your talent to turn financial dreams into financial reality!


Enquiry

For more information, please contact:



Institute of Financial Planners of Hong Kong

Unit 2601, Bank of East Asia Harbour View Centre, 56 Gloucester Road, Wanchai, Hong Kong
Tel : 2982 7888/2982 7834 (Mavis Ng) Fax : 2982 7777 Email : marketing@ifphk.org Website: www.ifphk.org

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OBJECTIVES

- Honor outstanding university students who show sound financial acumen and knowledge about financial planning.
- Raise awareness of financial planning among university students.
- Highlight the young talents to the entire financial planning industry.
- Further strengthen public awareness of the benefits of financial planning at an early age.
- Promote the six steps of personal financial planning process.
- Introduce financial planning as a rewarding career to university students.

ELIGIBILITY

- All full-time undergraduate students studying at any university in Hong Kong recognized by the HKSAR Government.
- Participation in groups of three to four who come from the same university.

FORMAT

- The Award is divided into 3 rounds.



First Round - Detailed Financial Plan

All teams will receive a standard case and are required to submit a full detailed written financial plan that fulfils the following criteria:

- Should include a thorough analysis and comprehensive solution of the standard case, written straight to the point.
- Should be written in **English** using a 12-point font in Microsoft Word.
- Should contain no more than 12 pages of A4 paper (excluding front cover, back cover and appendices). Background and reference information should be attached as appendices.
- Should submit 3 copies of your plan by deadline.
- Should attach a copy of your application form or a separate sheet containing your personal particulars with the written plan. Do NOT include any of your personal information and name of university in your plan.

Assessment Criteria:

- i. Application of financial knowledge
- ii. Demonstration of the understanding of financial planning concepts
- iii. Relevancy of the solutions provided
- iv. Comprehensiveness and clarity of written presentation

Among the teams from each University, the team that has met the benchmark set for the 2010 Awards and with the highest score will be selected to enter the second round competition.

Second Round - Video Presentation of Recommendations

The selected teams are required to present their recommendations based on the following criteria:

- Should submit their presentation in **video format** (mpg format) and provide supplementary information in written format to IFPHK office by deadline.
- Entire presentation should be conducted in **English** and should NOT exceed 10 minutes.

The Top 3 teams will be selected to enter the final round.

Assessment Criteria:

- i. Comprehensiveness and clarity of both the written and verbal presentation
- ii. Understanding of client situation
- iii. Competence to provide sound financial planning advices and recommendations

Final Round - Presentation

The selected Top 3 teams of students will receive a topic related to current issue of financial planning and need to present at the final round based on the following criteria:

- Present the given topic and their views within 15 minutes in **English**.
- Each team will have 5 minutes to comment on the other team and present their own comments or suggestions.
- 5-minute Q&A session for the panel of judges for each team after the presentation.
- The 1st, 2nd and 3rd prize winners will be selected by the panel of judges.

The Final Round session will be opened up for university professors, awards participants, university students and media, with sharing on presentation performance and career prospects of a financial planner from judges and industry practitioners.

Assessment Criteria:

- i. Knowledge on the current financial planning issue
- ii. Analytical skills
- iii. Spontaneous reaction to judges' questions



PRIZES/ RECOGNITION

- First prize – Internship program*, HK\$10,000 scholarship, trophy and certificate.
 - Second prize – HK\$8,000 scholarship, trophy and certificate.
 - Third prize – HK\$5,000 scholarship, trophy and certificate.
 - Consolation prizes – HK\$1,000 scholarships and certificates.
 - One-year IFPHK student membership and Certificates of Merits for the top 18 teams.
 - Trophies for each University, whose teams won 1st, 2nd or 3rd prizes.
 - Certificates for all teams who completed the 1st round.
 - Ambassador Program – the top 18 teams will be invited to join the program and represent the IFPHK to promote financial planning, Awards and CFP certification to the students and the public.
 - Extra awards for:
 - Best Presentation of Written Financial Plan
 - Best Presentation Video
 - The Top team from each university will receive trophies.
- * The internship program provides an exclusive opportunity to work in one of the top financial institutions.

INFORMATION SESSION

- Winning Strategies at the Financial Planner Awards

Date: 23 January 2010 (Saturday)

Time: 10:00 am - 11:30 am

Venue: Chiang Cheng Studio Theatre, Chung Sze Yuen Building, The Hong Kong Polytechnic University, Hung Hom, Kowloon

What will you get?

- Explanation from judges on the judging criteria.
- Tips in building and presenting an award-winning financial plan.
- Real life experience from a CFP^{CM} professional of what financial planners do.
- Career prospect in the Financial Planning industry.

REGISTRATION & SUBMISSION

- If you would like to take this challenge, please submit the application form by mail or fax to the Institute of Financial Planners of Hong Kong on or before **11 February 2010**.

Fax: 2982 7777

Address: **SCMP/IFPHK Financial Planner Awards 2010 – University Student category**
Unit 2601, 26/F, Bank of East Asia Harbour View Centre
56 Gloucester Road, Wanchai, Hong Kong

- Email acknowledgement will be sent to the teams after application is received.
- All teams are required to submit 3 hard copies of the written financial plan AND a RECENT *passport size photo* of each member (no photocopy or hard-copy printout) on or before **5 March 2010**.

Timeline

Date	Events
23 January	Information session
11 February	Application form submission deadline
5 March	First round case submission deadline
12 April	First round result announcement and start of Second round
27 April	Second round video submission deadline
12 May	Second round result announcement and start of Final round
29 May	Final round presentation
TBC	Awards Presentation Dinner

COPYRIGHT

1. All entries will not be returned to the teams. Organizers have the right to use the entries received for exhibition, publishing and any other publicity and promotion purposes.
2. All entries will not in any way infringe any third party's right. Each team should ensure copyright clearance before any material is included in their plan for submission.

ENQUIRY

Tel: 2982 7888 / 2982 7834 (Mavis Ng)

Email: marketing@ifphk.org

Website: www.ifphk.org

SCMP/IFPHK Financial Planner Awards 2010 University Student Category

Application Form

Please fill in all of the following details in BLOCK LETTERS.

University Name: _____ (Eng Only)

Team Name: _____ (Eng Only)

Leader

Name: Mr/Miss _____ (Eng Full Name)

_____ (Chi)

Email: _____

Tel: _____

Current Year: _____

Faculty & Major: _____

Member 2

Name: Mr/Miss _____ (Eng Full Name)

_____ (Chi)

Email: _____

Tel: _____

Current Year: _____

Faculty & Major: _____

Member 3

Name: Mr/Miss _____ (Eng Full Name)

_____ (Chi)

Email: _____

Tel: _____

Current Year: _____

Faculty & Major: _____

Member 4

Name: Mr/Miss _____ (Eng Full Name)

_____ (Chi)

Email: _____

Tel: _____

Current Year: _____

Faculty & Major: _____

1. Please indicate if you will attend the information session to be held on 23 January 2010. * Yes / No.

If yes, please provide the name of attending members: _____

2. The information you have provided will be used by the organizers for promotion purposes. Please indicate if you agree to receive such promotion materials. * Yes / No

* Delete where inappropriate

Remarks

1. Please return the completed form on or before **11 February 2010** by fax at 2982 7777 or by mail to IFPHK, Unit 2601, Bank of East Asia Harbour View Centre, 56 Gloucester Road, Wanchai, Hong Kong, stating **"SCMP/IFPHK Financial Planner Awards 2010 - University Student Category"** on the envelope.
2. Acknowledgement will be sent via email after application is received.
3. All teams are required to submit 3 hard copies of the written financial plan AND a RECENT passport size photo of each member (no photocopy or hard-copy printout) on or before **5 March 2010**.

Organized by:



South China Morning Post