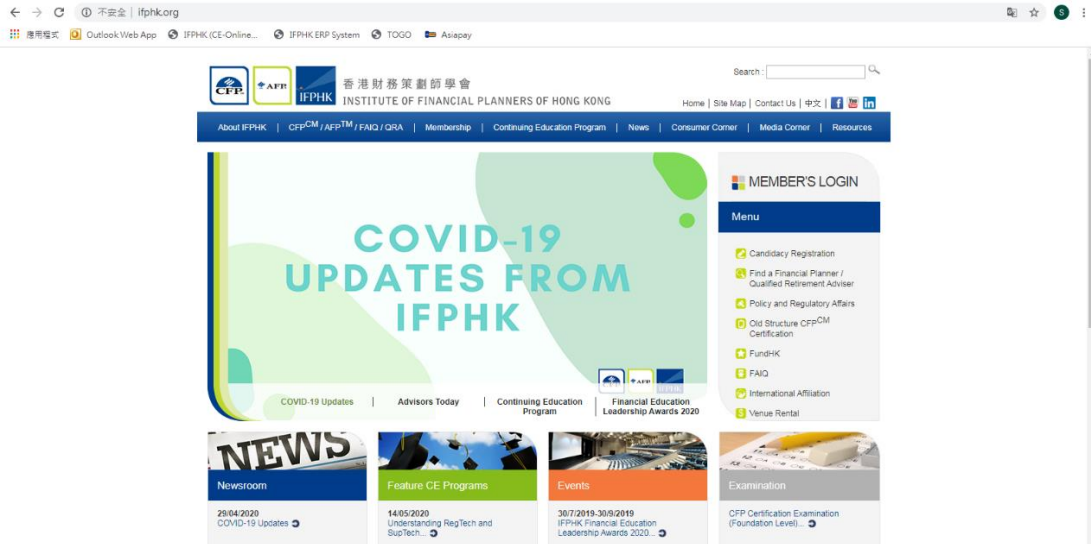


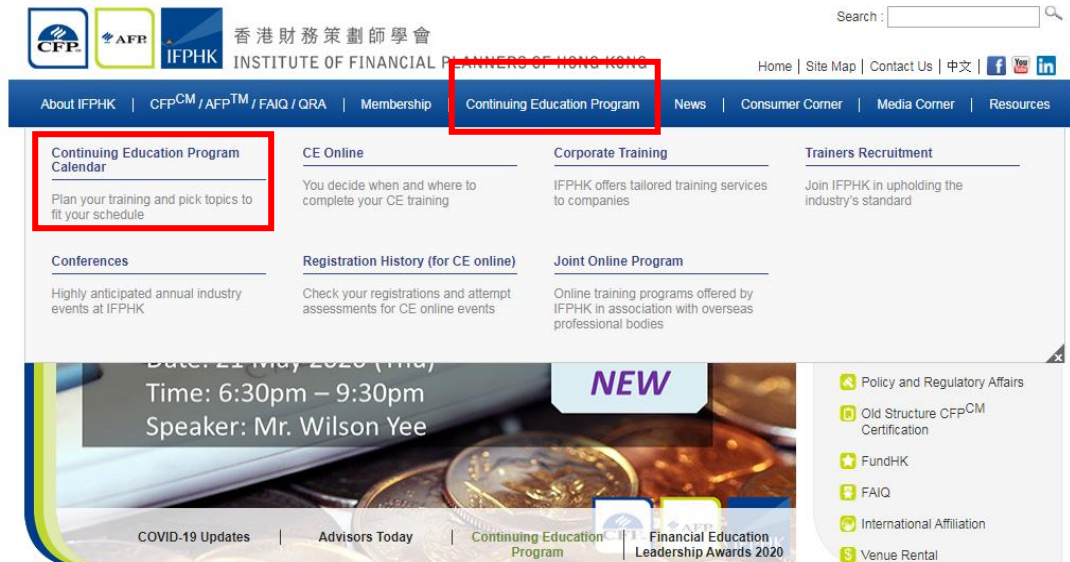
## Instruction of Using CE Coupon 使用 CE Coupon 的流程

- 1) Go to <http://www.ifphk.org/> (IFPHK Official website).  
進入 <http://www.ifphk.org/> (香港財務策劃師學會官方網站)。



- 2) Click the bottom 1) 'Continuing Education Program' and 2) 'Continuing Education Program Calendar'.

點擊按鈕 1) '持續進修課程'和 2) '持續進修課程一覽表'。



3) Select the program that you would like to register.

選擇所需報名的課程。

**My Shopping Cart**

Selected: 0

Member Price Total: HK\$0

Non-Member Price Total: HK\$0

CE Catalog Check out

Registration Form

				MPFA (Non Core): 6.00 QRA: 0.00 QRA (Designated): 0.00
Refresher Program for CFP Certification (Level 1)	RC13A	Mr. CH Tse		IFPHK: 6.00 IFPHK (Compulsory): 0.00 SFC: 6.00 IA: 0.00 MPFA (Core): 0.00 MPFA (Non Core): 6.00 QRA: 0.00 QRA (Designated): 0.00
30/05/2020,06/06/2020 02:30 PM-05:30 PM				
(Webinar) Virtual Banking – The Next Generation <span style="color: red;">NEW</span>	M2297	Dr. Lam Yat-fai		IFPHK: 3.00 <span style="color: orange;">HK\$660</span> IFPHK (Compulsory): 0.00 <span style="color: orange;">(Member Price)</span> SFC: 3.00 IA: 3.00 <span style="color: orange;">HK\$810</span> MPFA (Core): 0.00 <span style="color: orange;">(Non-Member Price)</span> MPFA (Non Core): 3.00 QRA: 0.00 QRA (Designated): 0.00 <span style="color: blue;">Add to Cart</span>
Refresher Program for CFP Certification (Level 2)	RC14A	Mr. Wilson Yee		IFPHK: 6.00 IFPHK (Compulsory): 0.00 SFC: 6.00 IA: 0.00 MPFA (Core): 0.00 MPFA (Non Core): 6.00 QRA: 0.00 QRA (Designated): 0.00
25/05/2020,01/06/2020 06:30 PM-09:30 PM				
(Webinar) Wealth management to deal with longevity risk <span style="color: red;">NEW</span>	RZ214	Mr. Wilson Yee		IFPHK: 3.00 <span style="color: orange;">HK\$660</span> IFPHK (Compulsory): 0.00 <span style="color: orange;">(Member Price)</span> SFC: 3.00

4) Click 'Add to Cart' to add the program to your shopping cart.

點擊‘加入購物籃’，把課程加到購物籃中。

**My Shopping Cart**

Selected: 0

Member Price Total: HK\$0

Non-Member Price Total: HK\$0

CE Catalog Check out

Registration Form

Following the public consultation in early 2018, the Hong Kong Monetary Authority issued in May 2018 a revised Guideline on Authorization of Virtual Banks, with an aim to promote the new generation of cyber banking under the backdrop of FinTech and to encourage overseas customer to use the banking services in Hong Kong. As at 31 August 2018, a total of 29 institutions have submitted applications to apply for virtual bank licences.

In this course, the speaker will analyze the business model, emerging risks and regulatory requirements of virtual banks. The advantages and limitations of virtual banks will be discussed. The technology risk, money laundering risk and due diligence risk specific to virtual bank will be explained. The compliance measures to address these emerging risks will also be proposed.

**Content:**

- History of virtual banks
- Contemporary virtual banking
- Cyber customer onboarding
- Money laundering risk
- Risk management and compliance
- Impacts to the banking industry

	Speaker(s): Dr. Lam Yat-fai		Language: Cantonese
	Venue: IFPHK Office		
	Recognition: IFPHK: 3.00 IFPHK (Compulsory): 0.00 SFC: 3.00 IA: 3.00 MPFA (core): 0.00 MPFA (non core): 3.00 QRA: 0.00 QRA (Designated): 0.00		Fee: HK\$660 (Member Price) HK\$810 (Non-Member Price)

Back
Print
Add to Cart

- 5) Check **'My Shopping Cart'** and continue **'Check out'**.  
 檢視購物籃，並進行結算。

### My Shopping Cart

**Selected: 1**

(Webinar) Virtual Banking – The X  
 Next Generation  
 28/05/2020  
 06:30 PM-09:30 PM

---

**Member Price Total: HK\$660**  
**Non-Member Price Total: HK\$810**

[CE Catalog](#) Check out

- 6) Continue **'Registration'**.  
 繼續'登記'。

## Continuing Education Program

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- o Corporate Training
- o Trainers Recruitment
- o Conferences
- o Registration History (for CE online)
- o Joint Online Program

Topic (Date & Time)	Member Fee	Standard Fee	Recognition	
(Webinar) Virtual Banking – The Next Generation  <u>Date</u> 28/05/2020 <u>Time</u> 06:30 PM-09:30 PM <u>Venue</u> IFPHK Office	HK\$660	HK\$810	IFPHK: 3 IFPHK (Compulsory): 0 SFC: 3 IA: 3 MPFA (Core): 0 MPFA (Non Core): 3 QRA: 0 QRA (Designated): 0	remove

**Member Price Total: HK\$660**  
**Non-Member Price Total: HK\$810**

Enroll more topics
Registration

- 7) Enter your **e-mail address** and **password** to Login.  
 填寫電郵地址和密碼以作登入。

IFPHK members please login below to enjoy Member Fee :

Email Address :

Password :

Login
Non-member Registration

Forgot your password ? Please click [here](#).

8) Choose Coupon '2020\_SPECIAL\_CFP HK\$525.00' and 'Confirm' the process.

Remark: The Member Price Total will show the discounted price having deducted the coupon price HK\$525 .

選擇優惠卷'2020\_SPECIAL\_CFP HK\$525.00'，並點擊確認。

備注：總額(會員)會顯示為扣減 HK\$525 後的所剩總額。

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Topic (Date & Time)	Member Fee	Standard Fee	Coupon	Recognition	
(Webinar) Virtual Banking – The Next Generation <u>Date</u> 28/05/2020 <u>Time</u> 06:30 PM-09:30 PM <u>Venue</u> IFPHK Office	HK\$660	HK\$810	2020_SPECIAL_CFP HK\$525.00 -- 2020_CFP_A HK\$50.00 <del>2020_TEST_1 HK\$1000.00</del> 2020_SPECIAL_CFP HK\$525.00	IFPHK: 3 IFPHK (Compulsory): 0 SFC: 3 IA: 3 MPFA (Core): 0 MPFA (Non Core): 3 QRA: 0 QRA (Designated): 0	remove

Member Price Total: HK\$135  
Non-Member Price Total: HK\$810

Enroll more topics

9) Make sure your registration info is correct and agree with the Terms and Conditions.

檢查你的個人資料是正確的，並且同意各項登記條款。

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Registration Info.:

Name :	Wong Cafeew
ID Card Number :	a123456
Address :	大大公司, 大馬路21號, 北京
Country :	大島
Mobile No. :	236589744440
Office Tel. :	96325899
Home Tel. :	56987412
Fax No. :	56987452
Email :	cafeewong@ifphk.org
Other Email :	
Company :	大一銀行
Position :	行政人員
License No. :	CFPHKXXXXXX
Fee :	HK\$135
Pay by :	Credit Card
Remark :	

Personal History:

Topic	Date	Fee	Recognition
香港財務策劃師學會 - 2008財務策劃職業講座	05/05/2008	HK\$0.00	IFPHK: 0.00 IFPHK (Compulsory): 0.00 SFC: 0.00 IA: 0.00 MPFA (Core): 0.00 MPFA (Non Core): 0.00 QRA: 0.00 QRA (Designated): 0.00

**Personal History:**

Topic	Date	Fee	Recognition
香港財務策劃師學會 - 2008財務策劃職業講座	05/05/2008	HK\$0.00	IFPHK: 0.00 IFPHK (Compulsory): 0.00 SFC: 0.00 IA: 0.00 MPFA (Core): 0.00 MPFA (Non Core): 0.00 QRA: 0.00 QRA (Designated): 0.00

**Terms And Conditions:**

1) Enrolment 報名

a) Registration will be on First-Come-First-Served basis upon receipt of payment. IFPHK members will be given priority. 報名將以先到先得並已全數繳交所需費用為準。本會會員享有優先報名的權利。

b) IFPHK reserves the right to refuse registration if applicants fail to make payment, and/or are unable to provide accurate and complete information as stated in the registration form. 申請人報讀本學會課程時須按報名表上的要求提供正確及完整的資料，並繳付所需費用。如申請人未達以上要求，本學會有權拒絕其申請。

c) In general, ACKNOWLEDGMENT will be sent via email within 7 days after the receipt of registration form. 本學會一般會於接收報名表七個工作天內以電郵與申請人確認收妥課程申請。

2) Course Fee 課程費用

a) Registration paid by cheque will be processed only if the cheque reaches IFPHK within 5 working days from date of registration. No post-dated cheques will be accepted. 以支票繳付學費的申請人必須於報名後五個工作天內將支票送達本學會，否則其申請將不獲受理。本學會概不接受期票。

b) Program fees paid are non-refundable and non-transferable irrespective of individual's attendance status, with the

I declare that the information given in this application form is truthful and complete. I understand that any false and misleading information will lead to disqualification of my application for registration. Any fees paid will not be refunded. I also read and understand all the General Notes regarding my application. 本人謹此聲明，本人所提供之資料均屬真實及完整。如有任何虛報或誤導資料，則本人的申請資格均會被取消。所有已繳費用概不退還。本人亦已閱讀及明白所有申請須知。

Please tick the box if you do not want to receive news on training products and services from IFPHK. 若不希望收取學會的產品或服務資訊電郵，請在空格內打勾。

Confirm & Submit

Back

(If the program fee of the program you registered is equal to or lower than the Coupon Value (\$525), please proceed to step 13.)

(若你的課程總額費用等於或少於 HK\$525，請跳至步驟 13。)

**10) (Only applicable if the program fee of the program you registered is higher than coupon value (\$525) Choose the payment method and fill in your card information.**

(若你的課程總額費用多於 HK\$525) 請選擇付款方式和填寫信用卡資料。



Transaction Information

Merchant Name : The Institute of Financial Planners of Hong Kong (Testing)  
Merchant Reference No. :E02692700041832  
Transaction Amount : HKD 200.00  
Transaction IP Address : 203.86.159.133

Please fill in the card information:

Card Number :   
Expiry Date (mm/yyyy) : 07 ▾ 2020 ▾  
Name as shown on card :

**Note:** As certain card-issuing banks might not yet be ready for internet transaction, please contact your card-issuing bank for any problems in using your card for transactions via PayDollar.

\* If you have already registered **Verified By VISA**, you will be required to provide your corresponding password after confirmation as requested by your issuing bank.



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Transaction Information

Merchant Name : The Institute of Financial Planners of Hong Kong (Testing)  
Merchant Reference No. :E02692700041832  
Transaction Amount : HKD 200.00  
Transaction IP Address : 203.86.159.133

Please fill in the card information:

Card Number :   
Expiry Date (mm/yyyy) : 07 ▾ 2020 ▾  
Name as shown on card :

**Note:** As certain card-issuing banks might not yet be ready for internet transaction, please contact your card-issuing bank for any problems in using your card for transactions via PayDollar.

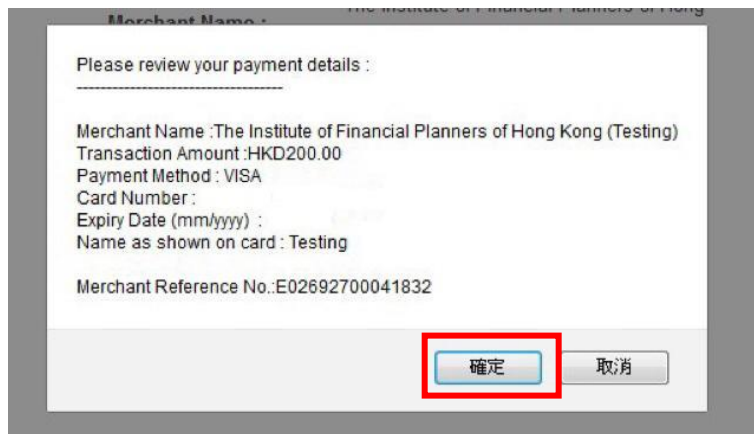
\* If you have already registered **Verified By VISA**, you will be required to provide your corresponding password after confirmation as requested by your issuing bank.



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11) Review your payment details and 'submit' the transaction.

檢查你的付款詳情，並提交是次交易。



Processing. Please wait...



Note: As credit card issuing banks might not be...

12) The payment process is completed. Please click on "Continue" button to proceed.

You can also 'Print' the result for your reference.

交易進行成功。點擊繼續以跳出交易版面，或選擇列印是次交易結果。

### Transaction Result

Your payment transaction is completed

Merchant Name :	The Institute of Financial Planners of Hong Kong (Testing)
Transaction Amount :	HKD 200.00
Payment method :	VISA
Card Number :	**** * **** - **** - 5005
Expiry Date (mm/yyyy) :	** / ****
Name as shown on credit card :	Testing
Merchant Reference No. :	E02692700041832
Transaction IP Address :	203.86.159.133
Payment Reference No. :	000007864336

Note: This transaction will be recorded in your bank / credit card account statement as with merchant name " ASIAPAY (HK) LTD "

Please contact your merchant " The Institute of Financial Planners of Hong Kong (Testing) " for any order and delivery queries.



PayDollar Payment Service 

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## 13) Your registration is **completed**.

交易已完成。

### Continuing Education Program



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#### Registration Success

##### REGISTRATION SUCCESSFUL.

Thank you for registering for seminars/events/CE-Online assessment offered by IFPHK.

Registrations for CE courses, seminars & conferences:

A confirmation notification will be sent to you via email at least 3 working days prior to the commencement of the class. Applicants who do not receive the confirmation by the said date should contact IFPHK at 2982 7888. (IFPHK reserves the right to cancel classes due to under-enrolment, individuals will be notified and full refund will be arranged.)

Registrations for CE Online:

Your application is successful. Please login (Member / Non-member) to start your assessment. We look forward to seeing you at our events and seminars.

#### Registration Information:

<b>Name :</b>	Wong Cafeew
<b>ID Card Number :</b>	a123456
<b>Address :</b>	大大公司, 大路21號, 北京
<b>Country :</b>	大島
<b>Mobile No. :</b>	236589744440
<b>Office Tel. :</b>	96325899
<b>Home Tel. :</b>	56987412