

IMPORTANT NOTES

1. IFPHK/CII joint members are required to renew their joint membership annually. A joint membership year runs from 1 January to 31 December.

Deadline for submitting renewal application : 31 December 2024

2. Completed application form with appropriate annual fee must be received by IFPHK on or before the deadline. Late submission after this deadline will not be accepted. Annual fee is non-refundable and non-transferable. CII and IFPHK reserve the right to review the membership fee on an annual basis
3. Please consider the renewal channels and your preferred payment method:

To pay by bank transfer/deposit	Renewal Form
To pay by cheque	Renewal Form
To pay by credit card	Online Renewal

4. 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: IFPHK/CII Joint Membership Renewal”

5. According to the Hongkong Post, mail items bearing insufficient postage are subject to surcharge. IFPHK will not absorb the insufficient postage, and it could result in the mail being returned. Therefore, applicants are advised to ensure that their mail bears sufficient postage and contains return address.
6. IFPHK will acknowledge the receipt of renewal application by email. Further, an acknowledgement slip will be issued to those who submit the application in person at the IFPHK office.
7. All applications are subject to review and approval by IFPHK and CII. 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 membership renewal application, please contact us at (852) 2982 7888 or by email: faiginfo@ifphk.org.

SECTION ONE: MEMBERSHIP & PAYMENT

ID Card/Passport No. <small>(as printed on ID card/passport)</small>		IFPHK Membership No. AF	
English Name <small>(as printed on ID card/passport)</small>		Chinese Name <small>(if applicable & as printed on ID card/passport)</small>	
Email Address <small>(email address in our examination/membership record(s) will be updated with the information provided here)</small>			

Annual Joint Membership Fee for Year 2025

(in which, 5% will be contributed to IFPHK building fund):

☐ **HK\$1,700**

[Part of the above will be used to pay CII membership fee]

☐ **Cheque**

Cheque No. _____ Drawn on (Bank): _____
 (Cheques should be made payable to "IFPHK Ltd.")

☐ **Bank Transfer / Deposit**Account Information

Bank Name/Code : HSBC (004)

Account No. : 002-8-414118

Account Name : The Institute of Financial Planners of Hong Kong Limited

(Please attach a copy of transfer / bank-in slip to this application form.)

(Please renew your membership online if you wish to pay the fee(s) by credit card.)

For official use only	
Date Received	Approval
Date entry	Remarks
Bank-in date	

SECTION TWO: AGREEMENT**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 and CII to:
 - a. fully and fairly process my application,
 - b. disclose any personal data where IFPHK and CII have an obligation to make such disclosure under the requirements of any law binding on IFPHK and CII,
 - c. disclose to the public my joint membership status, date of award of joint membership, professional standing and history of disciplinary actions as an IFPHK/CII joint member and the date of my ceasing to be an IFPHK/CII joint member (if applicable),
 - d. use my personal data to compile statistics and analyse the results wholly for use within IFPHK and CII,
 - e. disclose my personal data to the 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 and CII being unable to or refusing to process this application.
3. I agree that IFPHK may disclose my joint 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 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.

Application Statement

I understand and agree to the above Personal Data Agreement. Also, 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 offence other than a minor traffic or littering 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 as an Associate Member and acknowledge that the Board of Directors of the IFPHK may terminate a person's IFPHK membership if it considers the person not fit to be a member, such as but not limited to where the person has been convicted of a criminal offence, is adjudicated bankrupt, is mentally incapacitated, or if the person's opinion or conduct is injurious to the interest or character of the IFPHK.

Signature: _____

Date: _____

CHECKLIST

Please make sure that you have completed the following items:

- ☐ *Section One: Membership & Payment* (page 1)
 - ☐ [If you are paying by cheque] Attached a cheque payable to "IFPHK Ltd" with the correct amount.
 - ☐ [If you are paying by bank transfer/deposit] Attached a copy of transfer / bank-in slip.
- ☐ *Section Two: Agreement:* read and signed (page 2).
 - ☐ Selected your option in relation to the disclosure of joint membership status to your employer (page 2).

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: Membership & Payment* of this renewal form. If email address is not provided, the email will be sent to the email address on IFPHK record.

ACKNOWLEDGEMENT OF RECEIPT

For Renewal Application Form Submitted **in Person**

To: _____ (Please fill in your full name)

We hereby acknowledge the receipt of your IFPHK/CII Joint Membership Renewal Application Form for Year 2025.

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 membership renewal application, please contact us by email at faiqinfo@ifphk.org.

Thank you for your continual support to IFPHK and CII.

IFPHK Chop:

Date