



Membership No.: S

Student (University) Membership Renewal Application Form

IMPORTANT NOTES

1. Student members (except complimentary student members) of IFPHK are required to renew their membership annually. The one year membership period is by calendar year, from 1 January to 31 December. **Deadline for submitting the complete renewal application for year 2010: 31 December 2009.**
2. Completed application form with appropriate annual fee must be received by IFPHK on or before the deadline. Incomplete application will not be accepted under any circumstances.
3. 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
Unit 2601, 26th Floor, Bank of East Asia Harbour View Centre
56 Gloucester Road, Wanchai, Hong Kong**

“Re: Student (University) Membership Renewal”

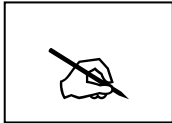
4. All applications are subject to review and approval by IFPHK. IFPHK endeavours to notify the result of the application within six to eight weeks’ time. If you have any concerns, issues or further queries regarding the Student (University) membership renewal application, please contact us at 2982 7888 or by email: membership@ifphk.org.

For Official Use Only					
Date Received	Data Entry	Completed with all info	Payment	Evaluation	Approval
		<input type="checkbox"/> Yes <input type="checkbox"/> No	To F&A on: Confirmed on:		
Follow up/ Remarks:					

STUDENT (UNIVERSITY) MEMBERSHIP RENEWAL APPLICATION FORM FOR YEAR 2010

SECTION ONE: PERSONAL PROFILE

Remarks: No verbal request for changes over the phone will be accepted.



Membership No.: S

Title: * Dr/Mr/Mrs/Ms/Miss **Name:** _____ (Eng) _____ (Chinese)
(as printed on your ID card/passport)

HKID/ Passport* No.: _____

Professional Qualification: CFA / CGA / CMA / ChFC / CLU / ANZIIF / FCII / FSA/
 (if applicable) FCPA / CPA / Doctoral Degree / Others* _____

Email Address: _____
(for sending acknowledgement of receipt if applicable)

* circle where appropriate

Contact Details

Correspondence Address: _____

Tel: _____ (Mobile) _____ (Home)

Fax: _____ **Email Address:** _____
(if different from above)

Education

Name of Education Institution: _____

Qualification to be Attained*: _____ (in year: _____)

* If graduated, please contact IFPHK at 2982 7829 for upgrading to other IFPHK memberships.

Currently Held Statutory Licences (if applicable)

SFC	
<input type="checkbox"/> Type 1 Dealing in Securities	<input type="checkbox"/> Type 6 Advising on Corporate Finance
<input type="checkbox"/> Type 2 Dealing in Futures Contracts	<input type="checkbox"/> Type 7 Providing Automated Trading Services
<input type="checkbox"/> Type 3 Leveraged Foreign Exchange Trading	<input type="checkbox"/> Type 8 Securities Margin Financing
<input type="checkbox"/> Type 4 Advising on Securities	<input type="checkbox"/> Type 9 Asset Management
<input type="checkbox"/> Type 5 Advising on Futures Contracts	
IA	
<input type="checkbox"/> Individual Agent	<input type="checkbox"/> Technical Representative of Insurance Agent
<input type="checkbox"/> Responsible Officer of Insurance Agency	
Others	
<input type="checkbox"/> MPF Intermediaries	<input type="checkbox"/> CIB
<input type="checkbox"/> PIBA	

STUDENT (UNIVERSITY) MEMBERSHIP RENEWAL APPLICATION FORM FOR YEAR 2010

Preference



1. If you do not want to receive any promotional emails 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 communication*:

- English
- Chinese

* Note: 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 TWO: AGREEMENT

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 (University) member and the date of my ceasing to be a Student (University) 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. (FPSB) 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 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: _____

STUDENT (UNIVERSITY) MEMBERSHIP RENEWAL APPLICATION FORM FOR YEAR 2010

SECTION THREE: PROCESS AND PAYMENT DETAILS

Annual membership fee for Year 2010: HK\$50 (in which, 15% will be contributed to IFPHK capital fund)

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

Payment by credit card: VISA MasterCard

Card No.: -

Card Expiry Date: /

Cardholder's Name: _____

Cardholder's Signature: _____ Date: _____

For Official Use Only		
Membership No.	Name of Student Member	Remarks
S		

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: Personal Profile of this renewal form. If email address is not provided, there will be no acknowledgement sent.



ACKNOWLEDGEMENT OF RECEIPT

For Renewal Application Form Submitted in Person



To: _____ (Please fill in your full name)

We hereby acknowledge the receipt of your Student (University) Membership Renewal Application Form for Year 2010.

Please note that we will begin processing your application. You will be promptly notified of the results once your application has been approved.

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 (University) membership renewal application, please contact us by email at membership@ifphk.org.

Thank you for your continual support to IFPHK.

Institute of Financial Planners of Hong Kong

Date