



Corporate Membership 

APPLICATION FORM



香港財務策劃師學會
INSTITUTE OF FINANCIAL PLANNERS OF HONG KONG

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Introduction of IFPHK

IFPHK was established in June 2000 as a non-profit organization for the fast-growing financial services industry. It aims to be recognized in the region as the premier professional body representing financial planners dedicated to upholding the highest professional standards.

The Institute is the sole licensing body in Hong Kong authorized by Financial Planning Standards Board Limited to grant the much-coveted and internationally-recognized CFP® Certification and AFP® Certification to qualified financial planning professionals in Hong Kong and Macau.

Currently there are more than 223,700 CFP certificants in 27 countries/regions; the majority of these professionals are in the U.S., Canada, China, Australia and Japan, with approximately 3,800 CFP certificants in Hong Kong.

IFPHK has 6,700 members in Hong Kong including 1,200 Qualified Retirement Adviser (QRA) holders; and represents financial planning practitioners in diverse professional backgrounds such as banking, insurance, independent financial advisory, stock broking, accounting, and legal services.

CFP®, CERTIFIED FINANCIAL PLANNER®,  CFP®,  CERTIFIED FINANCIAL PLANNER®, AFP®, ASSOCIATE FINANCIAL PLANNER®,  AFP® and  ASSOCIATE FINANCIAL PLANNER® are trademarks owned outside the U.S. by Financial Planning Standards Board Ltd. The Institute of Financial Planners of Hong Kong is the marks licensing authority for the CFP marks and AFP marks in Hong Kong and Macau, through agreement with FPSB.

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List of Founding Members (in alphabetical order)

AllianceBernstein Hong Kong Limited
Altruist Financial Group Limited
American Express Bank Limited
AIA International Limited
AXA China Region Insurance Company Limited
Bank of China (Hong Kong) Limited
BNP Paribas Private Bank
Charles Schwab, Hong Kong, Limited
China Construction Bank (Asia) Corporation Ltd.
Chubb Insurance Hong Kong Limited
Citibank, N.A., Hong Kong
DBS Bank (Hong Kong) Limited
Fidelity Investments Management (Hong Kong) Limited
Franklin Templeton Investments (Asia) Limited
FTLife Insurance Company Limited
Hang Seng Bank Limited
INVESCO Hong Kong Limited
Manulife (International) Limited
MLC (Hong Kong) Limited
Morgan Stanley Dean Witter Asia Limited
Pegasus Financial Services Limited
Prudential Hong Kong Limited
Royal Skandia Life Assurance Limited
Sun Life Hong Kong Limited
T G Holborn (HK) Limited
The Hongkong and Shanghai Banking Corporation Limited
The Life Underwriters Association of Hong Kong Limited
UBS AG
Zurich Life Insurance Company Limited

IFPHK Corporate Membership

Corporate Members are organizations that are engaged in the financial planning or financial services industry in Hong Kong. Any corporations involved with financial planning services or interested in expanding their services in financial planning are welcome to join IFPHK.

Corporate Membership Benefits

As a corporate member of IFPHK, your company will enjoy access to a combination of opportunities and advantages that are designed to improve the professionalism of your practitioners, illustrate your commitment to financial planning excellence and open new doors to potential clients. These include:

- Special members' rate to attend forums, conferences and CE programs organized by the IFPHK.
- Special members' rate to attend international conferences organized by sister associations of the IFPHK around the world.
- Preferential rates for bespoke and accredited in-house training programmes in financial planning and wealth management.
- Discounts for advertising in special supplements in selected newspapers where commissioned by the IFPHK.
- Invitations to networking and social events organized for IFPHK corporate members.
- A wide variety of sponsorship opportunities for IFPHK events.
- Discounts for renting IFPHK's training facilities and meeting rooms.

How to Apply?

Submit this “**Corporate Membership Application Form**”, **membership fee** together with a copy of your **valid business registration, annual report** or **prospectus**. Applicants will receive a membership certificate once the application has been processed. The application would take at least 4 weeks.

Membership Fee

One-year Membership (from date of approval to year end of corresponding year)

HK\$8,000

Two-year Membership (from date of approval to year end of next year)

HK\$15,000

Reminder

- Members should inform IFPHK of any changes in company profile.
- IFPHK reserves the right to make any alterations in regards to the policy, registration and benefits without prior notice.

For Office Use Only

Membership No.: _____

Date Received: _____

Date Approved: _____

The Institute of Financial Planners of Hong Kong

Corporate Membership Application Form

Company Profile

Company Name (English) _____

(Chinese) _____

Correspondence Address _____

Telephone (Main Line) _____ Fax (General) _____

Email (General) _____ Website* _____

*Do you wish to hyperlink your company's website from the website of IFPHK? Yes No

Business Field: (Please "✓" as appropriate)

- | | |
|---|--|
| <input type="checkbox"/> I1 Retail Banking | <input type="checkbox"/> I8 Securities Brokerage |
| <input type="checkbox"/> I2 Private Banking | <input type="checkbox"/> I9 Legal Practice |
| <input type="checkbox"/> I3 Investment Banking | <input type="checkbox"/> I10 Accounting Practice |
| <input type="checkbox"/> I4 Life Insurance | <input type="checkbox"/> I11 Academia |
| <input type="checkbox"/> I5 General Insurance | <input type="checkbox"/> I12 Real Estate Sector |
| <input type="checkbox"/> I6 Independent Financial Advisor | <input type="checkbox"/> I13 Other |
| <input type="checkbox"/> I7 Asset Management | (please specify: _____) |

Contact Details

Chief Executive Officer / Managing Director

Name: Mr / Ms / Mrs _____ Position: _____

Email**: _____ Direct Line: _____

Correspondence Address: _____

Secretary:

Name: Mr / Ms / Mrs _____ Position: _____

Email**: _____ Direct Line: _____

Contact Person (Contact point with IFPHK. Information from IFPHK will be sent to the contact person.)

Is Chief Executive Officer / Managing Director the contact person?

Yes No (Please fill in the information below)

Contact Person: Mr / Ms / Mrs _____ Position: _____

Email**: _____ Direct Line: _____

Correspondence Address: _____

Head of Training

Name: Mr / Ms / Mrs _____ Position: _____

Email**: _____ Direct Line: _____

Correspondence Address: _____

Contact Person for Training related issues:

Name: Mr / Ms / Mrs _____ Position: _____

Email**: _____ Direct Line: _____

Head of Marketing

Name: Mr / Ms / Mrs _____ Position: _____

Email**: _____ Direct Line: _____

Correspondence Address: _____

Contact Person for Marketing related issues:

Name: Mr / Ms / Mrs _____ Position: _____

Email**: _____ Direct Line: _____

Head of Communication / PR

Name: Mr / Ms / Mrs _____ Position: _____

Email**: _____ Direct Line: _____

Correspondence Address: _____

Contact Person for Communication / PR related issues:

Name: Mr / Ms / Mrs _____ Position: _____

Email**: _____ Direct Line: _____

*** IFPHK will regularly communicate with you via email*

Membership Fee and Payment (Please "✓" as appropriate) **HK\$8,000** One Year **HK\$15,000** Two Years**Payment Method** Cheque (Bank: _____ Cheque No.: _____)

Applicant Statement

I declare that the statements made in this application are true and complete and authorize the investigation of all statements made herein on behalf of the company with respect to this application. If the company becomes the subject of any criminal offence or has been expelled from a professional society or institute, I undertake to provide additional relevant documents together with this form. We understand that IFPHK has the final decision to refuse any application and/or terminate the membership of any corporate member which practices are proved to have adversely affected the CFP^{CM} marks, the profession and/or the reputation or otherwise of IFPHK.

I agree to procure the corporation to comply with the IFPHK Code of Ethics and Professional Responsibilities, the provisions of the IFPHK's Memorandum and Article of Association and IFPHK's Disciplinary Rules and Regulations at all times in practice.

Authorized Signature: _____ Date: _____

Company Chop

Remarks

- All applications are subject to review and approval by the IFPHK. The IFPHK may in its absolute discretion refuse to approve your membership application.
- Data submitted will be processed accordingly to Personal Data (Privacy) Ordinance.
- The IFPHK endeavours to notify the result of the application with 8 weeks. If you wish to enquire the status of your application, please contact us at 2982 7888.

Please return the original completed form together with appropriate fee to:

Marketing and Member Services Department, Institute of Financial Planners of Hong Kong
13/F, Causeway Bay Plaza 2, 463 - 483 Lockhart Road, Hong Kong

Enquiries: (Tel) 2982 7888 (Fax) 2982 7777 (Website) www.ifphk.org (Email) marketing@ifphk.org