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marketing@ifphk.org

Financial Planning Conference 2026 香港財務策劃師學會 財務策劃會議 2026

REGISTRATION FORM 報名表格

Please read the general notes before completing the Registration Form. Applicant must complete the Registration Form in BLOCK LETTERS. 請在填表前注意表格的申請須知，並用正楷填寫表格。

於 8 月 2 日或以前報名
可享預早報名優惠 [名額 200 名]
Early Bird Discount for Registration on or
before 2 August [Limited to 200 seats]

Section (A) 甲部 – Event Details 活動資料

Event Code 活動編號	Event Name 活動名稱	Date 日期 (DD/MM/YYYY)	Fee 費用		Ref No. 參考編號 (Office use only 內部專用)
			Member 會員	Non-Member 非會員	
FPC 26	Financial Planning Conference 2026 財務策劃會議 2026	3/9/2026	☐ HK\$1,480 HK\$880	☐ HK\$2,180 HK\$1,380	

Section (B) 乙部 - Personal Particulars 個人資料 *Mandatory field 必須填寫

Title 稱號	Mr 先生 / Ms 女士 / Mrs 太太 / Miss 小姐 (Please delete where inappropriate 請刪除不適用者)	HKID Card/Passport No. * 身份證編號/護照編號 (For the purpose of identification and CE record 以核對身份及登記持續進修學分)
Full Name 名字 * (As printed on your HK ID Card / Passport 必須與香港身份證 / 護照上相同)		
Company Name 公司名稱		Position 職位
Email Address 電郵地址 * (Confirmation notice will be sent via e-mail 確認通知會以電郵發出)		Mobile Phone No. 手提電話號碼 *
Mailing Address 郵寄地址		
Employment Field 行業	Please tick "✓" the one below that best describes the industry you are serving 請別選 "✓" 下列其中一個最能描述您所屬行業的編號	
☐ 1 Retail Banking 零售銀行	☐ 5 General Insurance 一般保險	☐ 9 Legal Practice 法律
☐ 2 Private Banking 私人銀行	☐ 6 Independent Financial Advisor 獨立理財顧問	☐ 10 Accounting Practice 會計
☐ 3 Investment Banking 投資銀行	☐ 7 Asset Management 資產管理	☐ 11 Academia 學術
☐ 4 Life Insurance 人壽保險	☐ 8 Securities Brokerage 證券經紀	☐ 12 Real Estate Sector 房地產界別
☐ 13 Other 其他 please specify 請註明: _____		
☐ If you do not want to receive news on training products and services from IFPHK, please tick here. 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。		

Section (C) 丙部 – Declaration 聲明

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。

Signature 簽署: _____

日期 Date: _____

Section (D) 丁部 - Payment Methods and Details 付款方式與詳情

Please deposit the amount payable to the following Bank account:

請將有關費用存至以下帳戶:

Bank 銀行:	HSBC
Bank Code 銀行代碼:	004
Account No 戶口號碼:	002-8-414118
Beneficiary 受款人:	The Institute of Financial Planners of Hong Kong Limited
FPS ID 轉數快號碼:	116279845

1.) Please send a copy of the bank-in slip or debit record, your full name and your mobile phone number to us by E-mail (marketing@ifphk.org)

請將入數/轉帳單據之副本，連同閣下的姓名及手提電話號碼，以電郵(marketing@ifphk.org)方式發送至本會。

2.) Please keep the original of the slip until class date in case of further check-up

請保留單據之正本，以便於有需要時作進一步查核。

Remarks: (1) Please read the general notes in the IFPHK's website 請於香港財務策劃師學會網站閱讀有關報名須知: <https://www.ifphk.org/fpc2026/generalnotes.pdf>
(2) Fee collected is non-transferable and non-refundable. 所繳付之費用不可轉讓他人及不設退還。
(3) Your personal information submitted in this form will only be used for the purpose of this function and will be treated confidentially. Privacy policy of the IFPHK is available at <https://www.ifphk.org/page.php?slug=privacy-policy&lang=en>. 閣下提供之資料只會用於是次活動之相關用途，所有資料亦會保密。有關學會之私隱政策，請瀏覽 <https://www.ifphk.org/page.php?slug=privacy-policy&lang=en>。

Enquiries 查詢: Tel 電話: 2982 7888 Email 電郵: marketing@ifphk.org Website 網址: www.ifphk.org

Office Address 會址: 13/F, Causeway Bay Plaza 2, 463 - 483 Lockhart Rd, HK 香港銅鑼灣灣駱克道 463-483 號銅鑼灣廣場二期 13 樓