

## 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 2025**

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:

**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: [membership@ifphk.org](mailto:membership@ifphk.org).

## SECTION ONE: MEMBERSHIP &amp; PAYMENT

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

**Annual Joint Membership Fee for Year 2026:**

☐ **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 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 2026.

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 [faiginfo@ifphk.org](mailto:faiginfo@ifphk.org).

Thank you for your continual support to IFPHK and CII.

IFPHK Chop:

Date



## RENEWAL - UPDATING PERSONAL PARTICULARS

### 續期一更新個人資料



#### Instructions 指引

1. This form is only necessary if you wish to submit your updates with the renewal form.  
此表格僅在遞交續期表格時一併更新資料才需遞交。
2. Active members can instantly change their personal particulars online under the Member's Area of IFPHK website (Login > Personal Profile > Personal Information Update).

有效會員可於學會網頁的會員專區即時網上修改個人資料。(登入 > 個人資料 > 個人資料更新)。

#### Required fields before updating 更新資料必須填寫

|         |                               |
|---------|-------------------------------|
| Name 姓名 | ID Card/Passport No. 身分證/護照號碼 |
|---------|-------------------------------|

#### Personal Profile 個人資料

##### Phone Number 電話號碼

(Mobile 手機)

(Office 公司)

(Home 住宅)

##### Mailing Address 通訊地址

##### Receiving publications 收取刊物

☐ Online publications 網上刊物

☐ Printed publications 印刷刊物

##### Language of communication 通訊語言

☐ English 英文

☐ Chinese 中文

##### Receiving Marketing Messages 收取市場推廣訊息

IFPHK may use email, mail or SMS to offer members and let them know about the availability of examinations, education programs, memberships, conferences, events, research and products and services. Pursuant to the Personal Data (Privacy) Ordinance, if you do not want to receive these messages from the IFPHK, please "tick" this box.

學會可能使用電子郵件、郵件或短訊提供及告知會員有關考試、教育課程、會籍、會議、活動、研究及產品及服務等資料。按《個人資料(私隱)條例》，若您不希望收取這些訊息，請在此格內打勾。

☐ ☒ = Not receiving  
不收取

#### Employment Details 就業資料

##### Current Employer 現時僱主

##### \* Employer Code 僱主編號

C

##### Current Position 現時職位

##### \* Industry Code 行業編號

I

##### Financial Planning Work Experience 財務策劃工作年資

(years 年)

##### \* Current Earnings 現時收入

E

\* please refer to the Code Tables on the next page 請參考下頁的編號對表

#### Academic / Professional Qualifications 學歷/專業資格

##### Academic Qualification Attained 所得學歷

##### Award Year 頒授年份

##### Name of Education Institution 教育機構名稱

##### Professional Qualification 專業資格

☐ AHKIB ☐ CFA ☐ ChFC ☐ CPA ☐ FLMI ☐ HKRFP ☐ Others 其他:  
☐ ANZIIF ☐ CFMP ☐ CLU ☐ CWM ☐ FRM ☐ LUTCF

##### Licences CURRENTLY Holding in Hong Kong 現時持有的香港牌照

☐ SFC 證監會

☐ HKMA 金管局

☐ IA 保監局

☐ MPFA 積金局

##### ACTIVE CFP® Certification / AFP® Certification in China 有效的中國 CFP®資格認證 / AFP®資格認證

☐ No 沒有

☐ Yes 有 (certification no. 中國資格認證編號: )

I declare that the information contained in this application is truthful and complete.

本人謹此聲明，本人所提供之資料均真實、完整。

Signature 簽名: \_\_\_\_\_

Date 日期: \_\_\_\_\_

## RENEWAL - UPDATING PERSONAL PARTICULARS

### 續期一更新個人資料

#### Code Tables 編號列表

##### Employer Code 僱主編號

(Please choose the group that your current employer belongs to 請選擇您現時僱主所屬的集團)

|                                              |                                                |                                                  |
|----------------------------------------------|------------------------------------------------|--------------------------------------------------|
| <b>C 1</b> AIA<br>友邦                         | <b>C 9</b> DBS Bank<br>星展銀行                    | <b>C 17</b> Standard Chartered Bank<br>渣打銀行      |
| <b>C 2</b> AXA<br>安盛                         | <b>C 10</b> Hang Seng Bank<br>恒生銀行             | <b>C 18</b> UBS<br>瑞銀                            |
| <b>C 3</b> Bank of Communications<br>交通銀行    | <b>C 11</b> HSBC<br>匯豐                         | <b>C 19</b> CMB Wing Lung Bank<br>招商永隆銀行         |
| <b>C 4</b> Bank of East Asia<br>東亞銀行         | <b>C 12</b> FWD Group<br>富衛集團                  | <b>C 20</b> Zurich Insurance Group<br>蘇黎世保險集團    |
| <b>C 5</b> Bank of China<br>中國銀行             | <b>C 13</b> Manulife<br>宏利                     | <b>C 22</b> Sun Life Hong Kong Limited<br>香港永明金融 |
| <b>C 6</b> China Construction Bank<br>中國建設銀行 | <b>C 14</b> Nanyang Commercial Bank<br>南洋商業銀行  | <b>C 23</b> CTF Life<br>周大福人壽                    |
| <b>C 7</b> Citibank<br>花旗銀行                  | <b>C 15</b> Prudential<br>保誠香港                 | <b>C 24</b> China Life<br>中國人壽                   |
| <b>C 8</b> OnePlatform<br>環一                 | <b>C 16</b> Shanghai Commercial Bank<br>上海商業銀行 | <b>C 21</b> Others 其他                            |

##### Industry Code 行業編號

(Please choose the one that best describes the industry you are serving, e.g. if you are serving as an accountant in a retail bank, you should choose **I 1**)

請選擇其中一個最能夠描述您所屬行業的編號；例：您於零售銀行任職會計師，應選擇**I 1**)

|                                       |                                                    |                                         |
|---------------------------------------|----------------------------------------------------|-----------------------------------------|
| <b>I 1</b> Retail Banking<br>零售銀行     | <b>I 6</b> Independent Financial Advisor<br>獨立財務顧問 | <b>I 11</b> Academia<br>學術              |
| <b>I 2</b> Private Banking<br>私人銀行    | <b>I 7</b> Asset Management<br>資產管理                | <b>I 12</b> Real Estate Sector<br>房地產界別 |
| <b>I 3</b> Investment Banking<br>投資銀行 | <b>I 8</b> Securities Brokerage<br>證券經紀            | <b>I 13</b> Others 其他                   |
| <b>I 4</b> Life Insurance<br>人壽保險     | <b>I 9</b> Legal Practice<br>法律                    |                                         |
| <b>I 5</b> General Insurance<br>一般保險  | <b>I 10</b> Accounting Practice<br>會計              |                                         |

##### Earnings Code 收入編號

|                                                                                 |                                                                                      |
|---------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| <b>E 1</b> Less than HK\$200,000<br>港幣 200,000 元以下                              | <b>E 4</b> HK\$600,000 – less than HK\$800,000<br>港幣 600,000 元 – 港幣\$800,000 元以下     |
| <b>E 2</b> HK\$200,000 – less than HK\$400,000<br>港幣 200,000 元 – 港幣 400,000 元以下 | <b>E 5</b> HK\$800,000 – less than HK\$1,000,000<br>港幣 800,000 元 – 港幣\$1,000,000 元以下 |
| <b>E 3</b> HK\$400,000 – less than HK\$600,000<br>港幣 400,000 元 – 港幣 600,000 元以下 | <b>E 6</b> HK\$ 1 million or above<br>港幣 1,000,000 元或以上                              |