

# HKIB Outstanding Financial Planner Awards 2007

## REGISTRATION FORM

Check box

- Step 1 Complete sections A to D in this form
- Step 2 Attach a business card and a colour photo onto this form
- Step 3 Submit this registration form in person or by post to HKIB on or before **27 July 2007**
- Step 4 Submit a genuine written financial plan in person or by post to HKIB on or before **17 August 2007**

HKIB will send confirmation and written plan guidelines by email to participants shortly after receiving this registration form. For enquiries, please click onto [www.hkib.org](http://www.hkib.org) or call 2153 7898.

### A. PERSONAL PARTICULARS

Mr/Ms/Mrs Surname \_\_\_\_\_ Given Name \_\_\_\_\_

Chinese Name \_\_\_\_\_ Date of Birth (DD/MM/YY) \_\_\_\_\_

HKID/Passport No. \_\_\_\_\_ Office Tel. \_\_\_\_\_

Mobile \_\_\_\_\_ E-mail \_\_\_\_\_

Correspondence Address \_\_\_\_\_

\_\_\_\_\_

Employer \_\_\_\_\_

Job Position \_\_\_\_\_ Department \_\_\_\_\_

Please attach a passport size colour photo here  
1.5" X 2"  
(with plain Background)

### B. CATEGORY & CHOICE OF LANGUAGE Please "✓" the appropriate box

- i) Years of financial planning experience
- Group A (up to 3 Years)
- Group B (over 3 Years)
- ii) Status of customer in the submitted plan
1. Single\*
2. Married
3. Married with children# \* or divorced # or divorced with children
- iii) Written financial plan
- English
- Chinese
- iv) Oral presentation
- English
- Chinese

### C. ENDORSEMENT BY EXISTING EMPLOYER

I hereby certify that the above information provided including years of financial planning experience is accurate to the best of my knowledge.

Name: \_\_\_\_\_

Position: \_\_\_\_\_

Company Name: \_\_\_\_\_

Signature (with company chop): \_\_\_\_\_

\_\_\_\_\_

Date:

### D. DECLARATION BY PARTICIPANTS

I hereby declare that all information provided in this registration form is correct. I shall not disclose any personal information of the submitted financial plan under any circumstances. And I authorize The Hong Kong Institute of Bankers to use my submitted financial plan for educational purposes, if needed.

Signature: \_\_\_\_\_

\_\_\_\_\_

Date: