

Practical Experience Form for Election to Certified Banker (CB) or Certified Financial Management Planner (CFMP)

This form is used to declare your work experience in order to be elected as a Certified Banker or Certified Financial Management Planner (professional designations include "CB (Stage I)"; "CB (Stage II)"; "CB" or "CFMP"). You will then be entitled to print the designation(s) on your business card and curriculum vitae to signify your professional excellence.

Notes to Applicants:

- 1. To be qualified, you are required to meet the following requirements:
 - a. fulfil the completion requirements of the designated qualification;
 - b. maintain our current membership; and
 - c. meet the required banking or finance related work experience (Maximum 1 year accumulated FULL- TIME internship in banking or finance related experience will also be considered).
- 2. To maintain this professional qualification status in the coming years, you are required to:
 - a. maintain your HKIB membership; and
 - b. fulfil the HKIB Continuing Professional Development (CPD) requirements.

Please complete the following sections and return the ORIGINAL form to the Institute.

Section A: Personal Details	
Name:	Name in Chinese:
(As on HKID / Passport)	
Membership No.:	E-mail:
Contact Tel No.: (Office)	(Mobile)
Section B: Work Experience	
	ence, you may have your current employment be certified by your employer, and/or our previous employment or full-time internship programme.
Part 1: Current Employment	(to be completed by the employer)
	Mrs
(ID No.:) has been in our employment fromto(DD/MM/YYYY) .
Please specify the areas of se □ Banking:	rvices that he/she is currently working in: (you may select more than one)
☐ Commercial Banking ☐ ☐ Treasury ☐	Corporate Banking □ Private Banking □ Personal Banking Compliance & Risk Management □ Investment Banking
☐ Other (please specify:) □ Insurance / Retirement planning
☐ Tax / Estate planning	☐ Comprehensive financial planning
☐ Securities	1
□ Other (please specify:)
	<u> </u>
Official Stamp & Authorized S	iignature Date
Name:	

Section B: Work Experience (Continued) Part 2: Previous Work Experience (if applicable) ☐ I have provided supporting document(s) for my previous work experience, e.g. reference letters. Part 3: Full-time Internship Work Experience (if applicable) ☐ I would like to submit my full-time internship experience as work experience. I have provided supporting documents, including reference letters and details of the internship programme. □ I confirm my full-time internship experience was banking or finance related with 1 year of accumulated internship experience. Section C: Acknowledgement and Declaration I declare that the information given in this form and the attachments is complete and correct. Date Signature The Collection of Personal Data The information provided will be used for the assessment of election for professional designation of the Institute. The collection of HKID card number (or other personal identifiers) is for the identification and the advancement of members' interest. The Hong Kong Institute of Bankers For office use only Membership Work Scroll

No.:

Experience:

Status: