

## REGISTRATION

Step 1: Complete the form below

Step 2: Submit a scanned copy of business card<sup>1</sup> and photo<sup>2</sup> to [ofmp-awards@hkib.org](mailto:ofmp-awards@hkib.org)

Note:

- Both Front and Back side (if applicable) copies of the business card must be submitted, with the file format: BC\_[Surname][Given name].pdf (e.g. BC\_Chan David.pdf)
- The photo should be in JPEG format in business attire, with plain white background and minimum 300 dpi resolution, in the file format: Photo\_[Surname][Given name].jpg (e.g. Photo\_Chan David.jpg). The photo will be used on HKIB OFMP Awards related publications whenever applicable.

Step 3: Payment

**All 3 of the above steps must be completed by registration deadline of 22 July 2022 (Friday).**

Hypothetical Case for Written Financial Plan will be sent after training on 29 July 2022 (Friday).

15<sup>th</sup> HKIB



OUTSTANDING  
FINANCIAL  
MANAGEMENT  
PLANNER  
AWARDS

**A. PERSONAL PARTICULARS** Information will be used on HKIB OFMP Awards related publications whenever applicable.

Salutation:	Surname:	Given Name:	Chinese Name:
Date of Birth (DD/MM/YYYY):		HKID/Passport Number (First 4 characters only, e.g. A123):	
Contact Number:		Contact Email:	
Correspondence Address:			
Official Name of Employer:		Department & Position:	
Coordinator's Name (Separate by ',' if more than one)		Coordinator's Contact Number: (Separate by ',' if more than one)	
Coordinator's E-mail (Separate by ',' if more than one):			

**B. CATEGORY AND ELIGIBILITY** Please ✓ appropriate box.

Customer Segment: General Wealth Management Customer		Customer Segment: High Net Worth Customer with investable assets of over US\$1 million (excluding the primary residence owned)
<input type="checkbox"/> Group A	<input type="checkbox"/> Group B	<input type="checkbox"/> Group C
Financial Management Planners with up to 3 years of experience	Financial Management Planners with over 3 years of experience	Financial Management Planners

**C. LANGUAGE** Please ✓ appropriate box.

I confirm to use the selected language\* below for my written financial plan (in all Judging Panels if being shortlisted)  
(please choose either one):  
 English     Chinese  
 \* The chosen language must be used during adjudication, but will NOT form part of the assessment.

I confirm to use the selected language\* below for my oral presentation (in all Judging Panels if being shortlisted)  
(please choose one):  
 English     Cantonese     Mandarin  
 \* The chosen language must be used during adjudication, but will NOT form part of the assessment.

**D. TRAINING** Please ✓ appropriate box(es).

Module (Please choose one)	Fee	Date of Training (Please choose one)		
		Module(I) (Complutory)	Module(II)	Module(III)
<input type="checkbox"/> Module(I) Foundation Training (3 hours) <b>ONLY</b>	HK\$ 800	<input type="checkbox"/> 26 Jul 2022 (Tue) <b>AM</b> <input type="checkbox"/> 28 Jul 2022 (Thu) <b>AM</b>		
<input type="checkbox"/> Module(I) Foundation Training (3 Hours) <b>AND</b> Module(II) Best Practices (3.5 Hours)	<input type="checkbox"/> EarlyBird HK\$1,180* <input type="checkbox"/> Regular HK\$1,680	<input type="checkbox"/> 26 Jul 2022 (Tue) <b>AM</b> <input type="checkbox"/> 28 Jul 2022 (Thu) <b>AM</b>	<input type="checkbox"/> 26 Jul 2022 (Tue) <b>PM</b> <input type="checkbox"/> 28 Jul 2022 (Thu) <b>PM</b>	
<input type="checkbox"/> Module(I) Foundation Training (3 Hours), Module(II) Best Practices (3.5 Hours) <b>AND</b> Module(III) Presentation Skills with Visual Aids (3.5 Hours)	<input type="checkbox"/> EarlyBird HK\$1,680* <input type="checkbox"/> Regular HK\$2,480	<input type="checkbox"/> 26 Jul 2022 (Tue) <b>AM</b> <input type="checkbox"/> 28 Jul 2022 (Thu) <b>AM</b>	<input type="checkbox"/> 26 Jul 2022 (Tue) <b>PM</b> <input type="checkbox"/> 28 Jul 2022 (Thu) <b>PM</b>	<input type="checkbox"/> 29 Jul 2022 (Fri) <b>AM</b> <input type="checkbox"/> 29 Jul 2022 (Fri) <b>PM</b>

\*Registration completed on or before 13 July 2022 (Wednesday) will be entitled the Early Bird Discount.

<b>E. PAYMENT METHOD</b>		Please ✓ appropriate box.				
<input type="checkbox"/> Crossed cheque / e-Cheque <sup>1</sup> made payable to "The Hong Kong Institute of Bankers" <input type="checkbox"/> Faster Payment System (FPS) <sup>1</sup> Account: <a href="mailto:account@hkib.org">account@hkib.org</a> <sup>1</sup> For e-Cheque / FPS, please state "The 15th HKIB OFMP Awards Registration Fee" under "Remarks" (e-cheque) or "Message to Payee/Recipient" (FPS) and email together with the completed Registration Form to <a href="mailto:ofmp-awards@hkib.org">ofmp-awards@hkib.org</a>	<input type="checkbox"/> Credit Card: <input type="checkbox"/> VISA <input type="checkbox"/> Master  <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="padding: 2px;">Card Holder's Name:</td></tr> <tr><td style="padding: 2px;">Card Number (e.g. 1234-5678-1234-5678):</td></tr> <tr><td style="padding: 2px;">Expirey date (MM/YY):</td></tr> <tr><td style="padding: 2px;">Signature:</td></tr> </table>		Card Holder's Name:	Card Number (e.g. 1234-5678-1234-5678):	Expirey date (MM/YY):	Signature:
Card Holder's Name:						
Card Number (e.g. 1234-5678-1234-5678):						
Expirey date (MM/YY):						
Signature:						
Cheque Number (First 6 No#):	Issued Bank:					
<b>F. ENDORSEMENT BY EXISTING EMPLOYER</b>						
Endorser's Name:	Endorser's Position:	Endorser's Department:				
Signature (with company chop):						
<b>G. DECLARATION BY PARTICIPANT</b>						
<ol style="list-style-type: none"> <li>1. I hereby declare that all information provided in this registration form is true and correct.</li> <li>2. I have obtained endorsement by existing employer as listed above.</li> <li>3. I shall not disclose any personal information of the submitted financial plan under any circumstances.</li> <li>4. I authorize The Hong Kong Institute of Bankers to use my submitted financial plan for educational purpose, if needed.</li> <li>5. I fully understand that I am not eligible to obtain the awards if, for whatever reasons, I am no longer employed by the awarded employer during the Awards Competition in the periods of June 2022 - February 2023.</li> </ol> <p>The Hong Kong Institute of Bankers reserves the right to disqualify any registration without a valid endorsement by existing employer, or found to have provided false information.</p>						
Signature:	Date:					