

REGISTRATION

Step 1: Complete the form below

Step 2: Submit a scanned copy of business card¹ and photo² to 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.

14th HKIB



OUTSTANDING
FINANCIAL
MANAGEMENT
PLANNER
AWARDS

Step 3: Payment

All 3 of the above steps must be completed by registration deadline of 16 July 2021 (Friday).

Hypothetical Case for Written Financial Plan will be sent after training on 30 July 2021 (Friday).

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) (Compulsory)	Module(II)	Module(III)
<input type="checkbox"/> Module(I) Foundation Training (3 hours) ONLY	HK\$ 800	<input type="checkbox"/> 27 Jul 2021 (Tue) AM <input type="checkbox"/> 29 Jul 2021 (Thu) AM		
<input type="checkbox"/> Module(I) Foundation Training (3 Hours) AND Module(II) Best Practices (3.5 Hours)	<input type="checkbox"/> EarlyBird HK\$1,080* <input type="checkbox"/> Regular HK\$1,580	<input type="checkbox"/> 27 Jul 2021 (Tue) AM <input type="checkbox"/> 29 Jul 2021 (Thu) AM	<input type="checkbox"/> 27 Jul 2021 (Tue) PM <input type="checkbox"/> 29 Jul 2021 (Thu) PM	
<input type="checkbox"/> Module(I) Foundation Training (3 Hours), Module(II) Best Practices (3.5 Hours) AND Module(III) Presentation Skills with Visual Aids (3.5 Hours)	<input type="checkbox"/> EarlyBird HK\$1,580* <input type="checkbox"/> Regular HK\$2,380	<input type="checkbox"/> 27 Jul 2021 (Tue) AM <input type="checkbox"/> 29 Jul 2021 (Thu) AM	<input type="checkbox"/> 27 Jul 2021 (Tue) PM <input type="checkbox"/> 29 Jul 2021 (Thu) PM	<input type="checkbox"/> 30 Jul 2021 (Fri) AM <input type="checkbox"/> 30 Jul 2021 (Fri) PM

*Registration completed on or before 25 June 2021 (Friday) will be entitled the Early Bird Discount.

E. PAYMENT METHOD		Please ✓ appropriate box.				
<input type="checkbox"/> Crossed cheque / e-Cheque ¹ made payable to “The Hong Kong Institute of Bankers” <input type="checkbox"/> Faster Payment System (FPS) ¹ Account: account@hkib.org ¹ For e-Cheque / FPS, please state “The 14th HKIB OFMP Awards Registration Fee” under “Remarks” (e-cheque) or “Message to Payee/Recipient” (FPS) and email together with the completed Registration Form to ofmp-awards@hkib.org	<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:					
F. ENDORSEMENT BY EXISTING EMPLOYER						
Endorser’s Name:	Endorser’s Position:	Endorser’s Department:				
Signature (with company chop):						
G. DECLARATION BY PARTICIPANT						
<ol style="list-style-type: none"> 1. I hereby declare that all information provided in this registration form is true and correct. 2. I have obtained endorsement by existing employer as listed above. 3. I shall not disclose any personal information of the submitted financial plan under any circumstances. 4. I authorize The Hong Kong Institute of Bankers to use my submitted financial plan for educational purpose, if needed. 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 2021 - February 2022. <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:					