

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 qualifications include "CB (Stage I)", "CB (Stage II)", "CB", "CB Macao (Stage I)" and "CFMP™"*).

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. have valid 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 professional membership; and
 - b. fulfil the HKIB Continuing Professional Development (CPD) requirements.

Please complete the following sections and return the **ORIGINAL form** to the HKIB.

Section A: Personal Details

Name: _____ <i>(As on HKID / Passport)</i>	Name in Chinese: _____
Membership No.: _____	E-mail: _____
Contact Tel No.: (Office) _____	(Mobile) _____

Section B: Work Experience

To provide proof of your work experience, you may have your current employment be certified by your employer, and/or provide supporting document(s) of your previous employment or full-time internship programme.

Part 1: Current Employment (to be completed by the employer)

This is to certify that Mr/Ms _____
(ID No.: _____) has been in our employment from _____ to _____.
(DD/MM/YYYY) (DD/MM/YYYY)

- Banking:**
- | | | | |
|--|---|---|---|
| <input type="checkbox"/> Commercial Banking | <input type="checkbox"/> Corporate Banking | <input type="checkbox"/> Private Banking | <input type="checkbox"/> Retail Banking |
| <input type="checkbox"/> Treasury | <input type="checkbox"/> Compliance & Risk Management | <input type="checkbox"/> Investment Banking | |
| <input type="checkbox"/> Other (please specify: _____) | | | |
- Investment
- | | |
|--|---|
| <input type="checkbox"/> Tax / Estate planning | <input type="checkbox"/> Insurance / Retirement planning |
| <input type="checkbox"/> Securities | <input type="checkbox"/> Comprehensive financial planning |
- Other (please specify: _____)

Official Stamp & Authorized Signature

Date

Name:

Section B: Work Experience (*Continued*)

Part 2: Previous Work Experience (*if applicable*)

- I have provided **the certified true copies of** 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 **the certified true copies of** 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.

The applicant should submit all relevant supporting documents for his/her previous work experience (i.e. reference letters, etc.) together with this form. Only certified true copies of the documents are accepted. We only accept photocopies of the documents which are certified as true copies by: -

- The HKIB staff; or
- HR/authorized staff of current employer (Authorized Institution); or
- A recognized certified public accountant / lawyer / banker / notary public; or
- Hong Kong Institute of Chartered Secretaries (HKICS) member.

Section C: Acknowledgement and Declaration

I declare that the information given in this form and the attachments is complete and correct.

Signature

Date

The Collection of Personal Data

The information provided will be used for the assessment of election for professional qualification 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 Status:	Work Experience:	Scroll No.:
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