

**Application Form 報名表格**

(for admission to **CERTIFIED FINANCIAL PLANNER<sup>CM</sup> Certification Education Programme**)

申請報讀香港財務策劃師學會註冊**CFP<sup>CM</sup>**認證教育課程適用

**Non-Credit  
bearing Mode**

Please read the Guide for Applicants on the other page before completing this form. 填寫本表格前請細閱附頁的申請人須知。

**For Office Use Only** Application Received on: \_\_\_\_\_  HKID verified by: \_\_\_\_\_ on \_\_\_\_\_  
 Acad/Prof Qual & other supporting documents verified by \_\_\_\_\_ on \_\_\_\_\_

**1. Personal Particulars 個人資料** (\*Please delete as appropriate 請刪去不適用選項)

Name (Surname first) 英文姓名 (姓氏先行) \_\_\_\_\_

Name in Chinese 中文姓名 \_\_\_\_\_  
Chinese Character Code 中文電碼 \_\_\_\_\_

If you are a non-local applicant, please enter 'Y' 若非本地申請人，請在方格內填「Y」字

HK ID Card/Passport No 香港身份證/護照號碼 \_\_\_\_\_

Date of Birth 出生日期 \_\_\_\_\_  
Day 日 Month 月 Year 年

Nationality 國籍 \_\_\_\_\_

Sex 性別 **M** 男 / **F** 女

Correspondence Address 通訊地址 (英文) \_\_\_\_\_

Tel. No. (Home) 住宅電話 \_\_\_\_\_

Tel. No. (Office) 辦公室電話 \_\_\_\_\_

Mobile 手提電話 \_\_\_\_\_

Pager 傳呼號碼 \_\_\_\_\_

Fax No. 傳真號碼 \_\_\_\_\_

E-mail 電郵地址 \_\_\_\_\_

**2. Course Particulars 報讀課程**

1. Course Code 課程編號 **C F P** \_\_\_\_\_

Course fees 學費 HK\$ \_\_\_\_\_

Course Title 課程名稱 \_\_\_\_\_

2. Course Code 課程編號 **C F P** \_\_\_\_\_

Course fees 學費 HK\$ \_\_\_\_\_

Course Title 課程名稱 \_\_\_\_\_

3. Course Code 課程編號 **C F P** \_\_\_\_\_

Course fees 學費 HK\$ \_\_\_\_\_

Course Title 課程名稱 \_\_\_\_\_

**Payment Method:**

**Total Course Fees 學費總額 HK\$** \_\_\_\_\_

Credit Card  BEA / AIG / HSBC Credit Card Interest Free Installment Programme  Cheque

I am fully aware and understand that the above IFPHK Registered CFP<sup>CM</sup> Certification Education Programme course(s) is/are offered in a non-credit bearing basis.

本人知悉及明白以上報讀之香港財務策劃師學會註冊**CFP<sup>CM</sup>**認證教育課程均為**非學分累積制課程**。

Signature 簽署 \_\_\_\_\_ Date 日期 \_\_\_\_\_

### 3. Qualifications & Working Experience 學歷/專業資格/工作經驗

(Fill in this part if relevant to this application 申請報讀課程所需的資歷)

Non-Credit  
bearing Mode

#### a. Academic qualifications 學歷

Awarding Institution 頒發機構	Title of Award 學銜	Year of Award 頒發年份

#### b. Professional qualifications 專業資格

Awarding Institution 頒發機構	Title of Award 學銜	Year of Award 頒發年份

#### c. Highest education level achieved (Please 3) 最高學歷程度 (請 3)

θ Primary or below 小學或以下程度

θ Lower Secondary 初中

θ Form 5 or equivalent 中五或同等程度

θ Form 6 or equivalent 中六或同等程度

θ Sub-degree 非學位文憑/證書

θ Associate Degree 副學士

θ Bachelor's Degree 學士學位

θ Postgraduate Diploma/Certificate 深造文憑/證書

θ Master's Degree 碩士

θ Doctoral Degree 博士

#### d. Working experience 工作經驗

From 由		To 至		Full Time 全職/Part Time 兼職	Name of Organization 機構名稱	Position 職位	Occupation 職業類別 (enter code 請填寫編號)
Month 月	Year 年	Month 月	Year 年				

#### Occupation Codes 職業類別編號

01 Accounting 會計

06 Education 教育

11 Social Services 社會服務

02 Administration & Management 行政及管理

07 Engineering 工程

12 Surveying 測量

03 Advertising 廣告

08 Literary & Creative Work 文字及創作工作

13 Transport 運輸

04 Banking & Financial Services 銀行及金融服務

09 Marketing & Sales 推廣及銷售

14 Others 其他 (Please specify 請註明)

05 Computing & Information Technology 資訊科技

10 Public Relations 公共關係

#### e. Other information relevant to this application 其他相關資料 (Please use a separate sheet if necessary 如不敷應用，請另備紙張)

### 4. Declaration 聲明

I authorise The Hong Kong Polytechnic University to use my personal data for processing my application for admission and for transferring to the student record system when I am offered a place of study. I understand that the information will be used in activities in support of my study at the University.

本人授權香港理工大學使用本申請表內有關的個人資料作處理申請入學之用。本人明白若獲得大學取錄，本人的資料將會轉為學生紀錄，並用於有關的教學事宜上。

I declare that all particulars given in this form are true and correct to the best of my knowledge and understand that provision of any false and misleading information will lead to disqualification of my application for admission and registration in the University. Any fees paid will not be refunded.

本人謹此聲明，此表格內所填報各事項，均屬真實無訛，如有任何虛報或誤導資料，則本人的申請及註冊資格均會被取消，所有已繳費用概不退還。

Signature 簽署

Date 日期

Detach this page and keep it for reference.

## Guide for Applicants

(for admission to CERTIFIED FINANCIAL PLANNER<sup>SM</sup> courses)

**Non-Credit  
bearing Mode**

### Instruction on completing the application form

1. Please complete the form in English and print in block letters.
2. Please complete all parts of the application form in full.
3. Please make sure that you have satisfied the entry requirements, if any.
4. Please complete the application form clearly and accurately; sign the application form before submitting your application. Incomplete forms will not be processed.

### Submission of application

5. Please submit your completed application form by hand or by post to QR702, 7/F Shirley Chan Building, The Hong Kong Polytechnic University, Hung Hom, Kowloon, Hong Kong with the followings:
  - supporting documents e.g. a photocopy of certificates, transcripts of your previous studies and etc.
  - a recent photo (size:1"x1.5") for applying library card

### Payment Methods and Procedures

6. Only the following three payment methods will be accepted:

**A. Credit Card:** Please pay your tuition fee at our Centre at QR702, 7/F, Core R, The Hong Kong Polytechnic University, Hung Hom, Kowloon, Hong Kong.

**B. Bank of East Asia / AIG / HSBC Credit Card Interest Free Instalment Programme:** Please complete the relevant Instalment Programme Application Form (together with a copy of both sides of the credit card for BEA and AIG card) and return it with this Course Application Form.

**C. Cheque:** Please send a crossed cheque (made payable to "The Hong Kong Polytechnic University") to our Centre at QR702, 7/F, Core R, The Hong Kong Polytechnic University, Hung Hom, Kowloon, Hong Kong.

### Closing date of application

7. Please refer to the closing date for application on the course schedule information sheet.

### Notification of application results

8. Successful applicants will receive a written notification from the Centre confirming that the enrolment about two weeks before course commencement together with the course schedule. Please contact the Centre if you do not receive any notification one week before the course commencement.
9. Unsuccessful applicants will be notified in writing by the Centre. Course fees paid, if any, will be returned to them by ordinary mail.

### Verification of supporting documents

10. Applicants must bring along the original copies of their qualifications and supporting documents for verification at our Centre within two weeks before course commencement.

### Fee refund policies

11. Except for unsuccessful applications or course cancellation, course fees are not refundable. Fees paid and places allocated on course are not transferable after application.

### Certification

12. A certificate of attainment will be issued to students who have satisfied all the prescribed requirements for completion. The Certificate will specify the title and the grade achieved.

### Use of information

13. Personal data provided as part of an application for admission will, during the admission process, be used solely for the purpose of admission, and in this connection the data will be handled by MEDC and other relevant institutions authorised to receive it.
14. Application papers of unsuccessful candidates will be destroyed after the admission process has been completed.
15. Application papers of successful candidates will become part of the student file and the data will thereafter be handled by MEDC and other relevant institutions authorised, e.g. IFPHK, to receive it.
16. Under the provisions of the Personal Data (Privacy) Ordinance, applicants have rights to request access to, and the correction of, their personal data. Applicants wishing to access or make corrections to their data should submit written requests to MEDC.

### Enquiries

17. All enquiries should be directed to:

Management and Executive Development Centre (MEDC)

QR702, 7/F, Core R, The Hong Kong Polytechnic University, Hung Hom, Kowloon, Hong Kong

Tel: 3400 2773 Fax :2765 6323 E-mail: mdgo@inet.polyu.edu.hk Website: www.polyu.edu.hk/medc

Note: The Centre reserves the rights to cancel any courses, and to make any necessary changes to the schedules, contents, and mode of delivery of the courses offered.

#### Counter Service Hours

**Mondays to Fridays** 9:00 am – 1:00 pm  
2:00 pm – 8:00 pm

**Saturdays** 9:00 am – 1:00 pm  
2:00 pm – 5:00 pm