



Membership / Training / Examination Application Form (Hong Kong)

for

Professional Banking Qualifications:

- ❖ Certified Banker (CB)
- ❖ Certified Banker (CB) (Stage II)
- ❖ Certified Banker (CB) (Stage I)
- ❖ Certified Financial Management Planner (CFMP)
- ❖ Enhanced Competency Framework (ECF)

Please read "**Important Notes for Application**" **BEFORE** completing this form


IMPORTANT NOTES FOR APPLICATION

This Application Form is designed to facilitate applicants to apply for HKIB membership, training and examination by submitting one single form. Applicants may choose to complete the respective sections as deemed appropriate.

A. Membership

1. All HKIB members are eligible to apply for HKIB professional qualification training and/or examinations. However, non-members can still enroll for ECF training and/or examination only if they are not applying for any professional designation.
2. It is compulsory for all individuals to maintain a valid membership status with HKIB if the applicants want to be elected and maintain HKIB professional designations (e.g. CB, CB (Stage II), CB (Stage I), AAML, CAMLP, ARWP and CRWP). For all professional designation holders, they have to maintain HKIB professional membership status and fulfill annual CPD requirement.
3. Individual Membership shall run from 1 January to 31 December in each calendar year. Members who fail to pay their subscription fees by 31 January of each calendar year will be treated as default members and the reinstatement policy will therefore be applied.

B. Training

1. Places will be allocated on 'first-come-first-serve' basis.
2. Participants who have settled payments will receive course confirmation by e-mail 7 days prior to the course commencement date.
3. Participants are obligated to inform the Institute if you do not receive the confirmation 3 days before the course begins.
4. Late training enrolment will be accepted up to 7 days after the stipulated application deadline. A late entry fee of HK\$200 (in addition to the training fee) will apply.
5. We reserve the right to reject an application at any time.
6. Participants can apply for the Government funding. Please visit www.wamtalent.org.hk for the list of reimbursable pilot training under Asset and Wealth Management (WAM) sector and also the relevant details.  Please note that only training fee can be applied for funding and examination fee is excluded.

C. Examination

1. Candidates who are taking the current training can choose to sit for the current examination or any subsequent ones. They can choose to sit for subsequent examinations
2. Applications must comply with the regulations published in the handbook.
3. Late examination application will be accepted up to 14 days after the stipulated application deadline. A late entry fee of HK\$200 (in addition to the examination fee) will apply.

D. Application Period and Method

1. Application will be accepted year-round.
2. Please refer to the Training and Examination Schedule for application deadline.
3. HKIB reserves the right to postpone, modify and/or cancel the scheduled training and/or examinations.
4. All fees paid are non-refundable and non-transferable.
5. Applicants can complete the Application Form and then submit to HKIB by hand, by mail, by e-mail or by fax.

Contact Us

Address : 3/F Guangdong Investment Tower, 148 Connaught Road Central, Hong Kong

Fax : (852) 2544 9946

Telephone : (852) 2153 7800

Email : application@hkib.org

Application Form

Section A: Personal Particulars

Part 1: Personal Details		
Title: <input type="checkbox"/> Mr. <input type="checkbox"/> Miss <input type="checkbox"/> Ms. <input type="checkbox"/> Dr.		HKIB Membership: <input type="checkbox"/> Yes _____ <input type="checkbox"/> No <i>(Please specify the Membership No.)</i>
Name in English: (as shown on identity document) (Surname) (Given Name)		Name in Chinese: (as shown on identity document)
HKID / Passport Number <i>(please delete where inappropriate)</i> :		
Mobile Phone No. :		Primary Email Address ¹ :
Part 2: Personal Details		
<<For New and Current Members who have to UPDATE their personal information>>		
Correspondence Address:		Secondary Email Address (if any):
Name of Current Employer:		Office Telephone No.:
Position:		Department:
Office Address:		
Division (for customized service): <input type="checkbox"/> Asset Management <input type="checkbox"/> Commercial / Corporate Banking <input type="checkbox"/> Compliance & Risk Management <input type="checkbox"/> Investment Banking <input type="checkbox"/> Operations & Support <input type="checkbox"/> Private Banking <input type="checkbox"/> Retail Banking <input type="checkbox"/> Treasury <input type="checkbox"/> Others: _____		Industry (for customized service): <input type="checkbox"/> Accounting / Audit <input type="checkbox"/> Banking <input type="checkbox"/> Commercial / Industrial <input type="checkbox"/> Education <input type="checkbox"/> Government / Regulator <input type="checkbox"/> Insurance <input type="checkbox"/> Legal Practice <input type="checkbox"/> Securities and other financial institutions <input type="checkbox"/> Others: _____
Highest Academic Qualification Obtained:	University / Tertiary Institution:	Date of Award:
Total years of work experiences in Banking and Finance:		
Other Professional Qualifications:		Professional Bodies:
<u>For entry qualification assessment, please attach copies of documentary proof of academic/ work experience/ professional qualification and submit together with this application form.</u>		

Note: ¹All HKIB Training Confirmation, Examination Attendance and related communication will be sent via email by using the **Primary Email Address**.

For Official Use

Ack	Log	CRM	MO
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Section B: Membership

I would like to apply for HKIB Individual Membership and understand that the annual membership period runs from 1 January to 31 December. Please check applicable box:

	Membership Type (for Hong Kong)	2018 Annual Subscription (Jan - Dec)
<input type="checkbox"/>	Ordinary	HK\$1,020
<input type="checkbox"/>	Student	HK\$200
<input type="checkbox"/>	Reinstatement for default member	HK\$500
One-off First Registration Fee*		HK\$200
Membership Application Total:		HK\$

*The one-off registration fee will be waived in 2018 membership application as the 55th Anniversary special offer.

Section C: Training

Name	Module	Training Code	Mode		Fee (HK\$)
<input type="checkbox"/> CB <input type="checkbox"/> ECF			<input type="checkbox"/> Tuition	<input type="checkbox"/> Tutorial (for AML only)	
<input type="checkbox"/> CB <input type="checkbox"/> ECF			<input type="checkbox"/> Tuition	<input type="checkbox"/> Tutorial (for AML only)	
<input type="checkbox"/> CB <input type="checkbox"/> ECF			<input type="checkbox"/> Tuition	<input type="checkbox"/> Tutorial (for AML only)	
Late Entry Fee (HK\$200)					
					Training Application Total
					HK\$

Please refer to the Training and Examination Schedule for details.

Section D: Examination

Name	Module	Examination Code	Mode		Fee (HK\$)
<input type="checkbox"/> CB <input type="checkbox"/> CFMP <input type="checkbox"/> ECF			<input type="checkbox"/> First Attempt	<input type="checkbox"/> Re-sit	
<input type="checkbox"/> CB <input type="checkbox"/> CFMP <input type="checkbox"/> ECF			<input type="checkbox"/> First Attempt	<input type="checkbox"/> Re-sit	
<input type="checkbox"/> CB <input type="checkbox"/> CFMP <input type="checkbox"/> ECF			<input type="checkbox"/> First Attempt	<input type="checkbox"/> Re-sit	
Late Entry Fee (HK\$200)					
					Examination Application Total
					HK\$

Please refer to the Training and Examination Schedule for details.

Section H: Information Source

From which of the following sources do you know about our Professional Banking Qualification?

- HKIB's website HR/Training Department Homepage of Education and Manpower Bureau
 Newspaper/Magazine Colleagues/Classmates/Friends Information Session/Exhibition
 Labour Department Others, please specify _____

Section I: Acknowledgement and Declaration

- I declare that the information contained in my application is truthful and complete, and will be used for the purpose of administration and communication by The Hong Kong Institute of Bankers (HKIB). I agree to notify HKIB of any material changes to my responses to any of the questions in this application, including my contact details. I understand and agree that HKIB may investigate the statements I have made with respect to this application, and that I may be subject to disciplinary actions for any misrepresentation (whether fraudulent and otherwise) in this application.
- I understand that the fees paid are non-refundable and non-transferable.
- I understand and agree to comply with all conditions, requirements, policies and procedures established by HKIB as may be amended from time to time.

For Membership Application:

- I understand that as a member of the HKIB, I shall be bound by the prevailing rules and regulations of the Institute.

For Training Application

- I declare that I have fulfilled the entry requirement of the training.

For Examination Application:

- I confirm that I have read the relevant handbook, examination-related information published in the HKIB, and/or Examination Guidance Notes, and fully understand and accept the regulations.

By my signature below, I am submitting my application and have fully read, understood and accepted the terms and conditions stated above.

Signature

Date

Section J: Document Checklist for Application

Please check the following items before submitting to the Institute and **keep a copy of all relevant documents for your own record.**

	Membership Application	Training Application	Examination Application
Completed all applicable sections of this form	☑	☑	☑
Signed and dated the acknowledgement and declaration	☑	☑	☑
Enclosed a copy of your identity card / passport	☑	☑	☑
Relevant document(s) for entry qualification assessment	N/A	☑	N/A
Payment or evidence of payment	☑	☑	☑