



## 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 designations include "CB (Stage I)"; "CB (Stage II)"; "CB" or "CFMP"*). You will then be entitled to print the designation(s) on your business card and curriculum vitae to signify your professional excellence.

### 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. maintain our current 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 membership; and
  - b. fulfil the HKIB Continuing Professional Development (CPD) requirements.

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

### 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/Mrs \_\_\_\_\_  
(ID No.: \_\_\_\_\_) has been in our employment from \_\_\_\_\_ to \_\_\_\_\_  
(DD/MM/YYYY) (DD/MM/YYYY)

Please specify the areas of services that he/she is currently working in: (*you may select more than one*)

Banking:

<input type="checkbox"/> Commercial Banking	<input type="checkbox"/> Corporate Banking	<input type="checkbox"/> Private Banking	<input type="checkbox"/> Personal Banking
<input type="checkbox"/> Treasury	<input type="checkbox"/> Compliance & Risk Management	<input type="checkbox"/> Investment Banking	

Other (please specify: \_\_\_\_\_)

Investment  Insurance / Retirement planning

Tax / Estate planning  Comprehensive financial planning

Securities

Other (please specify: \_\_\_\_\_)

  
  

Official Stamp & Authorized Signature	Date
Name: _____	

## Section B: Work Experience (Continued)

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

- I have provided 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 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.

## 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 designation 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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