



Application No.:

FPEP/2009/

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**Financial Planning Executive Program 財務策劃行政課程**  
APPLICATION FORM 申請表格

Please note that the following schedule is subject to change at the discretion of APIB.

CFP Module	Pre-requisites	Tentative Date (Every Saturday)	Time	Venue	Fee	
<input type="checkbox"/> Foundation of Financial Planning (Application Deadline: 14/8/2009)	None	19/9/2009 - 12/12/2009	2:30pm - 6:30pm	The Chinese University of Hong Kong, Shatin, N.T.	\$4,100*	
<input type="checkbox"/> Insurance	FFP	To Be Advised			\$4,100*	
<input type="checkbox"/> Investments	FFP	To Be Advised			\$4,100*	
<input type="checkbox"/> Taxation and Tax Planning	FFP	To Be Advised			\$4,100*	
<input type="checkbox"/> Employee Benefits and Estate Planning (Application Deadline: 11/9/2009)	FFP	10/10/2009 - 19/12/2009			\$4,100*	
<input type="checkbox"/> Advanced Financial Planning	5 CFP Modules	To Be Advised			2:30pm - 7:30pm	\$4,300*
<input type="checkbox"/> All Six Modules	FFP first	To Be Advised			2:30pm - 6:30pm	\$24,000*

\* The required textbook(s) published by IFPHK is/are NOT included.

Continuing Education Fund Reimbursable Course

Please ✓ the CFP Module(s) you want to apply.

持續進修基金可獲發還款項課程

Please complete every item in BLOCK letters.

Personal Particulars	
Name in English (surname first)	<input type="text"/>
(Please write your full name as printed on H.K.I.D. Card / Passport)	
Name in Chinese:	<input type="text"/>
Title: *Dr. /Mr. /Mrs. /Miss /Ms. (* Please delete as appropriate)	
Date of Birth:	DD <input type="text"/> <input type="text"/> MM <input type="text"/> <input type="text"/> YY <input type="text"/> <input type="text"/>
H.K.I.D./Passport No. <input type="text"/> ( )	
Nationality:	<input type="text"/>
E-Mail Address: <input type="text"/>	
Mobile No.	<input type="text"/>
Fax No. <input type="text"/>	
Home Tel.	<input type="text"/>
Residential Address	<input type="text"/>
Correspondence Address	<input type="text"/>
(if different from above)	<input type="text"/>

Education Background (latest qualification first)						
Institution	Location	Cert./Dip./Deg./ Other qualifications	Major/Minor Subject	Mode of Study <sup>#</sup>	Date of Award (MM/YYYY)	Office Use

<sup>#</sup> Mode of Study: Full-time / Part-time / Distance Learning

Professional Qualification (latest qualification first)				
Professional Qualification	Abbreviations	Qualified Date (MM/YYYY)		Office Use

  

Working Experience (most recent position first)				
Organization	Position	Major Responsibilities	From - To (MM/YYYY)	Office Use

Please specify your exact years and months of full-time working experience up to the application closing date.  
 \_\_\_\_\_ years and \_\_\_\_\_ months

How do you learn about this course?

- Brochures at Outlets       Newspaper Adv. (pls. specify) \_\_\_\_\_       Direct Mailing to Company  
 Mass Mail to CUHK Students       Newspaper Columns       Friends/Relatives       Web Site  
 Others \_\_\_\_\_

### Declaration

- I understand that I may receive course information from The Chinese University of Hong Kong (the University) in future. I will write to APIB if I do not wish to receive information of this kind.
- I understand that, upon my registration in the course, the data will become part of my student record and may be used for all purposes relating to my studies in accordance with the regulations of the University.
- Photocopy of Hong Kong Identity Card/Passport will only be used for verification purpose and will be removed from my file after the said purpose has been completed.

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

**Please mail this application form to FPEP, The Asia-Pacific Institute of Business, 2/F, Academic Building No.1, The Chinese University of Hong Kong, Shatin, New Territories, Hong Kong, with the following documents:**

- a non-refundable application fee of \$150 payable by crossed cheque or bank order to "The Chinese University of Hong Kong";
- copies of academic certificates / transcripts and professional qualifications;
- 1 recent photograph in size of 1.5 x 2 inches;
- a copy of Hong Kong ID card or passport;
- a copy of your valid Student / Staff Card if you are a CUHK student or staff;
- a copy of your valid staff card if you wish to enjoy the corporate rate; and
- Proof of completion of CFP Module 1 – Foundation of Financial Planning if you are applying for other CFP modules.

**\*\* Your application may NOT be processed if attachments required are not enclosed.**

Acknowledgement of application will be sent to applicant by email.  
 Telephone number for general enquiries: 2609-7430 / 2603-5119.



IFPHK Registered Education Program