



香港投資者學會
Hong Kong Institute of Investors

世界投資者協會聯盟成員
Member of World Federation of Investors Corporation (WFIC)

Date of receipt : _____

Reference No. : _____

(OFFICE USE ONLY)

HKII Education Fund

The HKII Education Fund is a Sponsorship Scheme commenced in March 2003. Under this Scheme, it offers cash sponsorship to finance the Founding and Supporting Societies to organize outstanding students' activities. The sponsored function may be solely organized by Founding Society, Supporting Society or jointly organized with Hong Kong Institute of Investors and / or its Tertiary Division.

Successful applicants should have excellent ideas and strong management skill in organizing events. They are expected to have a strong sense of commitment to enhancing tertiary students' knowledge of the various financial markets and investment tools, through which students can cultivate a proper investment concept applied in the actual investment environment and refine their investment skills in the long run.

The cash sponsorship is at the discretion of the Education Fund Committee of the Hong Kong Institute of Investors [the Fund Committee]. The Committee is composed of people who are the Representative of the Board of Directors of the Institute, the Councilors, Vice Chairman and Department Heads or Executive Committee Members of the Tertiary Division.



Application Form

[To be typed or completed in **Block Capitals and Blue or Black Ink**]

This Form should be completed AFTER carefully reading the **introductory leaflet** and the appended **Notes on Application**.

Information of the Society:

1. Name of Society: _____
2. University : _____
3. Name of President:
Mr. / Ms.: _____(English) _____(Chinese)
4. Year : _____ Major : _____
5. Student Number : _____

Mobile Number : _____
6. E-mail : _____

Information of the Person in Charge:

7. Name of Contact Person
Mr. / Ms.: _____(English) _____(Chinese)
8. Student Number : _____
Position : _____
9. University : _____



10. Year : _____ Major : _____

11. Correspondence Address : _____

12. Mobile Number : _____

13. Office Number : _____

14. Fax Number : _____

15. E-mail : _____

16. Society's Bank Account Number:

_____ (A/C no.) _____ (Name of the bank)

(Sponsorship will be paid out through this account number)

17. Name(s) of Authorized Signatures of the Bank Account :

18. Specimen of Authorized Signature(s) :



19. Requested Sponsorship amount:

20. Brief description of the function (e.g. type of the function, period of the function, etc.):

21. Has your society intended or do you intend to apply for any other sponsorships or forms of financial assistance in relation to your proposed function? If so, please list the names of the sponsors and the related sponsorship schemes as well as results of your applications, if known.

22. Please list any other information about your proposed function, which you consider important to this application.



Declaration By Applicant

I, _____(Name), _____(Position) of
_____ (Name of the society)

declare that the statements made in this application are, to the best of my knowledge, complete and accurate. I fully understand and accept the details and conditions of award of the Fund for which I am now applying as listed in the introductory leaflet.

I understand and agree that the data will be used for the purposes as stated in the introductory leaflet.

Signature with Society Chop	Date

Before you send us the Form, please get the followings ready:

1. A current year plan showing the details of all the activities to be held throughout the year.
2. A summary listing out the programs held last year.
3. A detailed proposal with a clear objective, detailed programme rundown, target audience and expected number of participants as well as any other proposed joint organizations and supporting organizations.
4. A detailed budget plan and requested sponsorship amount.
5. Any other relevant documents that may be useful for Fund Committee in making decision.
6. Your society's account copy.
7. Copies of Student ID Cards of both your society's President and the Project's Person-in-Charge.

Before you submit the Form, please:

1. Read the relevant terms and conditions on the introductory leaflet.
2. Reconfirm all of the statements made are complete and accurate.
3. Remember to sign the Form.