

# 攜手提升理財能力 改善香港市民的福祉

Working together to  
improve financial literacy and  
enhance financial wellbeing of  
Hong Kong people



申請指引  
APPLICATION  
GUIDE



# FOREWORD

## 前言

The Investor and Financial Education Council (IFEC) strives to encourage stakeholders to offer investor and financial education to the people in Hong Kong to help raise their financial literacy level. With improved financial literacy, people can better manage their finances, which leads to improved financial wellness and overall wellbeing.

To recognise the efforts of our stakeholders in advancing investor and financial education in Hong Kong, IFEC organises the “Investor and Financial Education Award” (IFEA) and invites different sectors to submit applications.

投資者及理財教育委員會(投委會)一直致力鼓勵持份者為香港普羅大眾提供投資者及理財教育,以提升他們的理財能力水平。當理財能力有所提升,市民便可更妥善管理財務,從而促進個人財務健康及整體福祉。

為表揚持份者推動本地投資者及理財教育的貢獻,投委會現舉辦「投資者及理財教育獎」,邀請各界報名參加。



# OBJECTIVES

## 目的

IFEA is a territory-wide award to acknowledge the enthusiasm and efforts of parties who committed to improving financial literacy in Hong Kong. It aims to:

- recognise the efforts of stakeholders in advancing investor and financial education;
  - facilitate sharing of best practices in investor and financial education projects; and
  - encourage stakeholders from different sectors to provide quality investor and financial education in Hong Kong.
- 嘉許推動投資者及理財教育的持份者；
  - 推廣優秀的投資者及理財教育項目；及
  - 鼓勵不同界別的持份者在香港推行優質的投資者及理財教育。

# AWARD CATEGORIES

## 獎項類別

There are three IFEA award categories:  
投資者及理財教育獎設有三個獎項類別：



投委會  
IFEC

投資者及理財教育獎  
Investor and Financial  
Education Award 2022



**IFEA (Corporate)**  
投資者及理財教育獎（企業）



**IFEA (Public/Professional Body and NGO)**  
投資者及理財教育獎（公共／專業機構及非政府機構）



**IFEA (Teaching)**  
投資者及理財教育獎（教學）



**School Division**  
學校組



**Teacher Division**  
教師組

# ELIGIBILITY

## 申請資格

### IFEA (Corporate)

- Business entities which have been operating in Hong Kong for at least one year with a valid Business Registration Certificate issued by the Inland Revenue Department

### IFEA (Public/Professional Body and NGO)

- Government bureaux/departments and statutory bodies
- Professional bodies and non-governmental organisations which have been operating in Hong Kong for at least one year

### IFEA (Teaching)

#### School Division

- Kindergartens, primary schools, secondary schools and tertiary institutions which have been operating in Hong Kong for at least one year

#### Teacher Division

- Teachers from kindergartens, primary schools, secondary schools and tertiary institutions who have been teaching in Hong Kong for at least one year
- Teachers can apply as individuals or as part of a team comprising a maximum of five teachers serving at the school

### 投資者及理財教育獎(企業)

- 於香港運作達一年或以上，並持有由稅務局發出的有效商業登記證的商業機構

### 投資者及理財教育獎(公共／專業機構及非政府機構)

- 政府決策局／部門及法定機構
- 於香港運作達一年或以上的專業團體及非政府機構

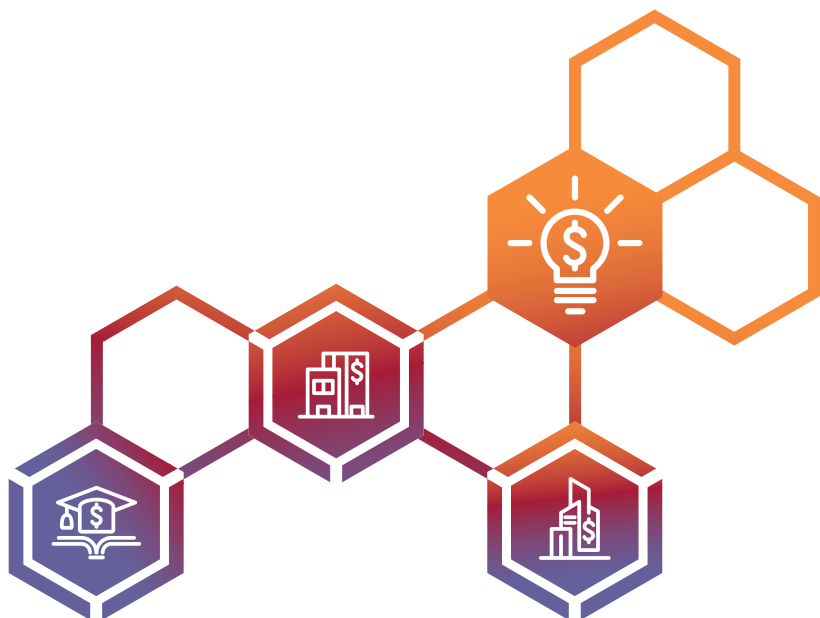
### 投資者及理財教育獎(教學)

#### 學校組

- 於香港運作一年或以上的幼稚園、小學、中學及大專院校

#### 教師組

- 於香港任教一年或以上的幼稚園、小學、中學及大專院校教師
- 教師可以個人或團隊形式申請參加，每隊由最多五名同校教師組成



# What investor and financial education projects are eligible?

## 哪些投資者及理財教育項目符合申請資格？

### The investor and financial education project ("Project") must fulfil the criteria below:

- The Project must be delivered in the period from 1 August 2021 to 31 July 2022.
- The Project must be provided to people in Hong Kong (e.g. general public, customers, employees, service users or students, etc.) for free.
- The content of the Project must be related to at least one of the seven core competency themes as defined in the Hong Kong Financial Competency Framework:
  - Money & banking
  - Income & taxation
  - Saving & investing
  - Spending & credit
  - Consumer rights & responsibilities
  - Financial planning
  - Protection & risk

For details of the Hong Kong Financial Competency Framework, please visit the IFEC website at <https://www.ifec.org.hk/common/pdf/fcf/hong-kong-financial-competency-framework.pdf>.

- The Project must not involve direct sales nor marketing of products or services.
- The Project must not be fully funded by the IFEC.
- The role(s) of the applicants in the Project can include funding, development, organisation and/or delivery of the Project, etc.
- The Project can be either solely organised or jointly organised with other organisation(s) (except for IFEA (Teaching) - Teacher Division applications). For a jointly organised Project, the applicant can either apply solely with the consent of other co-organiser(s) or jointly with all co-organiser(s). Each co-organiser in a joint-application will be assessed individually for the respective IFEA award category according to the business nature of each co-organiser.
- For the IFEA (Teaching) category, the Project must benefit students of the corresponding schools. If the Project targeted other audiences, e.g. school staff, the applicant may consider applying for the IFEA (Public/Professional Body and NGO) category.
- For each award category, each applicant can only submit one application with one Project. Application for more than one Project will not be considered.

### 投資者及理財教育項目（教育項目）必須符合以下條件：

- 教育項目必須在2021年8月1日至2022年7月31日期間實行。
- 教育項目必須為免費提供予香港的群眾，例如公眾人士、客戶、員工、社福機構服務使用者或學生等。
- 教育項目內容必須與「香港理財能力架構」的七個核心能力主題中最少一個相關：

- 金錢和銀行
- 收入和稅項
- 儲蓄和投資
- 開支和信貸
- 消費者權利和責任
- 財務策劃
- 保障和風險

有關「香港金融理財能力架構」進一步資料，請瀏覽投委會網頁

<https://www.ifec.org.hk/common/pdf/fcf/hong-kong-financial-competency-framework.pdf>。

- 教育項目不得涉及任何產品或服務的直接營銷及推廣成份。
- 教育項目不得由投委會全數資助。
- 申請者的角色可以包括資助、開發、策劃及／或實施教育項目等。
- 教育項目可以由申請者獨自舉辦或與其他機構合辦（投資者及理財教育獎（教學）- 教師組的申請者除外）。如屬合辦教育項目，申請者可選擇在其他協辦單位同意下以單獨申請者身份申請，或與所有協辦單位以聯合申請者身份申請。聯合申請中的每個協辦單位將會按其業務性質決定其所屬的獎項類別。
- 申請投資者及理財教育獎（教學）類別的教育項目必須針對校內學生。若教育項目以其他群組為對象，例如教職員，申請者可考慮申請投資者及理財教育獎（公共／專業機構及非政府機構）類別。
- 在每個獎項類別中，每位申請者只能提交一份申請。如申請表內提交多過一個項目，有關申請將不獲考慮。

# RECOGNITION

## 嘉許

To recognise the efforts of different applicants, there are two tiers of recognition in each of the award category/division:

### ● Certificate of Appreciation

- All eligible applicants will be presented with a Certificate of Appreciation.

### ● IFEA

- Shortlisted Projects will be nominated and reviewed by the Assessment Committees based on the assessment criteria (see page 5).
- For IFEA (Corporate) and IFEA (Public/Professional Body and NGO), the top 10 outstanding applicants of each award category will be presented with the IFEA, and the top three entries will be awarded with Gold, Silver and Bronze Awards.
- For IFEA (Teaching), the top five outstanding applicants of each division will be presented with the IFEA, and the top three entries of each division will be awarded as Gold, Silver and Bronze Awards.

All recipients of the IFEA will be entitled to use the award designation on their companies/organisations' promotional materials and website for one year commencing on the date of 1 December 2022.

為獎勵不同申請者所付出的努力，各個獎項類別／組別分別設有兩級嘉許：

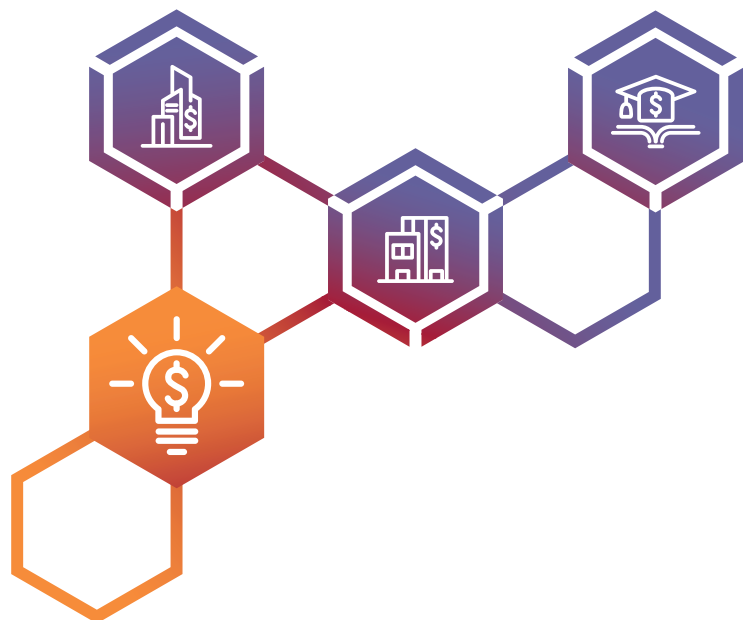
### ● 感謝狀

- 所有合資格申請者將會獲發感謝狀。

### ● 投資者及理財教育獎

- 入圍的教育項目將會被提名交由評審委員會按評審準則(見第5頁)審閱。
- 就投資者及理財教育獎(企業)及投資者及理財教育獎(公共／專業機構及非政府機構)兩個獎項類別，每個獎項類別中最優秀的10名申請者將獲頒投資者及理財教育獎，當中最優秀的三名將分別獲頒金、銀及銅獎。
- 就投資者及理財教育獎(教學)獎項類別中，學校組及教師組每組最優秀的五名申請者，將獲頒投資者及理財教育獎，當中每組最優秀的三名申請者將分別獲頒金、銀及銅獎。

所有獲頒投資者及理財教育獎的公司、機構及教師，將有權自2022年12月1日起計一年內，於其代表公司或機構的宣傳材料及網頁中使用「投資者及理財教育獎2022」的名稱／標誌，為期一年。



# ASSESSMENT 評審

## Assessment Criteria

Projects of all eligible applications will be reviewed based on the following assessment criteria:

1. **Content** – Ability to address the specific investor and/or financial education needs of the target audience/beneficiary with reference to the Hong Kong Financial Competency Framework or local needs.
2. **Effectiveness** – Ability to reach the target audience/beneficiary effectively, evidenced by performance indicators.
3. **Quality and Creativity** – Ability to engage and provide high quality learning experience/resources to the target audience/beneficiary through creative and innovative approaches.
4. **Sustainability** – Ability to implement and provide benefits and/or sustainable learning opportunities to the target audience/beneficiary over a period of time or recurrently.

## Assessment Committees

Shortlisted applications from each award category will be nominated and reviewed by the following Assessment Committees, comprising of government representatives, IFEC Board members and industry experts.

- IFEA (Corporate) Assessment Committee
- IFEA (Public/Professional Body and NGO) Assessment Committee
- IFEA (Teaching) Assessment Committee

## Notification to awardees

Awardees will be notified by 7 October 2022. Applications will be regarded as unsuccessful if the applicants do not receive confirmation by that date.

## 評審準則

所有符合申請資格的教育項目將按以下評審準則進行審閱：

1. **內容** – 能參照「香港理財能力架構」或本地需要以應對目標受眾／受惠者的特定投資者及／或理財教育需要。
2. **有效性** – 能有效地接觸目標受眾／受惠者並附設量度績效指標。
3. **質素和創新** – 能透過創意和創新的方式吸引目標受眾／受惠者，提供高質素的學習體驗／資源。
4. **可持續性** – 能持續或重覆實行，提供可持續學習機會以惠及目標受眾／受惠者。

## 評審委員會

各獎項類別的入圍申請將會被提名交由以下評審委員會審閱。評審委員會由政府代表、投委會董事局成員及行內專業人士組成。

- 投資者及理財教育獎(企業)評審委員會
- 投資者及理財教育獎(公共／專業機構及非政府機構)評審委員會
- 投資者及理財教育獎(教學)評審委員會

## 通知得獎者

得獎者將於2022年10月7日或之前收取通知。如申請者於該日前未收到確認通知，即代表是次申請未獲受理。



# APPLICATION PROCEDURES

## 申請程序

Application form can be downloaded at <https://www.ifec.org.hk/ifea>. Please submit applications to [flstrategy@ifec.org.hk](mailto:flstrategy@ifec.org.hk), and mark "Investor and Financial Education Award 2022 Submission" in the email subject.

Application materials should be in WORD, PDF or JPEG format with file size under 10MB.

### Points to note:

- Applicants must ensure that all information submitted is complete, accurate and factual.
- Application is free of charge.

### Enquiries

For enquiries, please email to [flstrategy@ifec.org.hk](mailto:flstrategy@ifec.org.hk).

申請表格可於投委會網頁<https://www.ifec.org.hk/ifea> 下載。提交申請表格，請電郵至[flstrategy@ifec.org.hk](mailto:flstrategy@ifec.org.hk)，標題註明「投資者及理財教育獎2022」。

提交資料必需為WORD、PDF或JPEG格式，檔案大小需要在10MB 以下。

### 注意事項：

- 申請者須確保所遞交的資料是完整、準確及真實。
- 申請費用全免。

### 查詢

如有查詢，請電郵至 [flstrategy@ifec.org.hk](mailto:flstrategy@ifec.org.hk)。

## Important Dates

### 重要日期

**Application deadline:** 1 September 2022

**Notification to awardees:** 7 October 2022

**Virtual Award Ceremony:** 15 November 2022

**截止申請日期:** 2022年9月1日

**通知得獎者:** 2022年10月7日

**網上頒獎典禮:** 2022年11月15日



# APPLICATION FORM

## 申請表格

**Application Deadline**  
**截止申請日期**  
**1/9/2022**

<b>PART 1</b> 第一部份	<b>AWARD CATEGORY APPLIED</b> 申請獎項類別	(Please select one category only. 請只選填其中一項。)
<input type="checkbox"/>	IFEA (Corporate) 投資者及理財教育獎 (企業)	Please go to Part 2A 請跳至第二甲部份
<input type="checkbox"/>	IFEA (Public/Professional Body and NGO) 投資者及理財教育獎 (公共／專業機構及非政府機構)	
<input type="checkbox"/>	IFEA (Teaching) - School Division 投資者及理財教育獎 (教學) - 學校組	
<input type="checkbox"/>	IFEA (Teaching) - Teacher Division 投資者及理財教育獎 (教學) - 教師組	Please go to Part 2B 請跳至第二乙部份

<b>PART 2</b> 第二部份	<b>APPLICANT DETAILS</b> 申請者資料
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**Part 2A** DETAILS OF COMPANY/ORGANISATION APPLICANT  
**第二甲部份** 公司／機構申請者資料

Company/Organisation information 公司／機構資料	
Name (must be the same as shown on the Business Registration Certificate) 名稱 (必須與商業登記證上名稱相同)	
English	
中文	
Business Nature 業務性質	
Company/Organisation Website 公司／機構網址	
For IFEA (Corporate) applicants 供投資者及理財教育獎 (企業)申請者	
Business Registration Certificate no. 商業登記證號碼	
Contact Person Details 聯絡人資料	
Title 稱謂 <input type="checkbox"/> Mr 先生 <input type="checkbox"/> Ms 女士 <input type="checkbox"/> Others, please specify 其他, 請列明	
Name 姓名 (English)	(中文)
Position 職銜	
Department/Division 部門	
Telephone 電話	
Company/Organisation email 公司／機構電郵	
Mailing Address 郵寄地址	

(Please go directly to Part 3 請跳至第三部份)

**Part 2B** DETAILS OF TEACHER APPLICANT**第二乙部份** 教師申請者資料

- ☐ Individual application 個人申請
- ☐ Team application (must comprise of teachers serving at the same school with a maximum of 5 teachers) 團隊申請 (須由同校教師組成, 最多五名教師)

For team application, please fill in the details of the team leader as the key contact person  
若以團隊方式申請, 請填寫隊長資料作主要聯絡人。

Title 稱謂 ☐ Mr 先生 ☐ Ms 女士 ☐ Others, please specify 其他, 請列明

Name 姓名 (English) (中文)

Name of school 任教學校名稱

School Address 學校地址

Subject(s) taught 任教科目

Telephone 電話 School 學校 Mobile 手提 (Optional 可選填)

Email 電郵 School 學校  
Personal 個人 (Optional 可選填)

**Details of team members 隊員資料**

Only applicable to team application. All team members must serve at the same school as the team leader and sign the declaration in Part 4.  
只適用於以團隊方式申請。所有隊員必須與隊長在同一學校任教及簽署第四部份的聲明。

1 Title 稱謂 ☐ Mr 先生 ☐ Ms 女士 ☐ Others, please specify 其他, 請列明

Name 姓名 (English) (中文)

Subject(s) taught 任教科目

2 Title 稱謂 ☐ Mr 先生 ☐ Ms 女士 ☐ Others, please specify 其他, 請列明

Name 姓名 (English) (中文)

Subject(s) taught 任教科目

3 Title 稱謂 ☐ Mr 先生 ☐ Ms 女士 ☐ Others, please specify 其他, 請列明

Name 姓名 (English) (中文)

Subject(s) taught 任教科目

4 Title 稱謂 ☐ Mr 先生 ☐ Ms 女士 ☐ Others, please specify 其他, 請列明

Name 姓名 (English) (中文)

Subject(s) taught 任教科目

**PART 3**  
**第三部份**

**INVESTOR AND FINANCIAL EDUCATION PROJECT ("PROJECT") DETAILS**  
**投資者及理財教育項目(「教育項目」)詳情**

**1. Name of the Project 教育項目名稱**

English

中文

**2. Implementation period 實施日期**

Start from 由:

To 至:

**3. Who was the target audience/beneficiary of the Project? 誰是教育項目的目標受眾/受惠者?**

- ☐ General public 市民大眾
- ☐ Customers 顧客
- ☐ Employees 員工
- ☐ Service users 服務使用者
- ☐ Students 學生
- ☐ Others, please specify 其他, 請註明: \_\_\_\_\_

**4. Was the Project provided for free? 教育項目是否免費提供?**

- ☐ Yes 是 ☐ No 不是

**5. What competency theme(s) as defined in the Hong Kong Financial Competency Framework was the Project related to? (Can choose more than one option)**

教育項目是有關哪項香港金融理財能力架構的能力主題? (可選多於一項)

- ☐ Money & banking 金錢和銀行
- ☐ Income & taxation 收入和稅項
- ☐ Saving & investing 儲蓄和投資
- ☐ Spending & credit 開支和信貸
- ☐ Consumer rights & responsibilities 消費者權利和責任
- ☐ Financial planning 財務策劃
- ☐ Protection & risk 保障和風險

**6. What was the nature of the Project? (Can choose more than one option)**

教育項目屬於以下哪項性質? (可選多於一項)

- ☐ Talk/webinar/seminar/course/workshop 講座/網上講座/研討會/課程/工作坊
- ☐ Event/exhibition/fair 大型活動/展覽/市集
- ☐ Online tools/website/mobile App 網上工具/網頁/應用程式
- ☐ Media production (video, audio) 媒體影音製作
- ☐ Social media/blog 社交媒體/網誌
- ☐ Printed matters 印刷品
- ☐ Research study/report 專題研究/報告
- ☐ Others, please specify 其他, 請註明: \_\_\_\_\_

7. (a) What was/were the role(s) of you/your company or organisation in the Project?  
你／你所屬的公司或機構在教育項目中擔當什麼角色？

(b) Was the Project co-organised with other organisations?  
教育項目是否與其他機構合辦？

☐

Yes 是

Please list out the names and respective roles of each organisation in the Project.  
請列明各機構名稱及於教育項目中所擔當的角色。

☐

No 否

(Please go directly to Question 8. 請跳至第8題)

(c) Do(es) you/your company or organisation apply solely or jointly with the co-organiser(s)?  
你／你所屬的公司或機構是單獨申請或與合辦機構聯合申請？

☐

Apply solely 單獨申請

☐

Apply jointly with the co-organiser(s) 與合辦機構聯合申請

For joint application, all co-organiser(s) must sign the declaration in Part 4.  
如若提交聯合申請，所有合辦機構必須簽署第四部份的聲明。

8. Please provide a short description of the Project, including objectives, implementation details, number of target audience/beneficiary reached, evaluation, etc. (no more than 300 words)  
請概述教育項目的目標、實行細節、接觸的目標受眾／受惠者人數及評估等情況。(不多於300字)

9. Please provide a short description of how the Project fulfils the assessment criteria as specified on page 5 of the Investor and Financial Education Award 2022 Application Guide. (no more than 300 words)  
請概述教育項目如何達到「投資者及理財教育獎2022」申請指引第5頁所載之評審準則。(不多於300字)

10. Please list out the supporting material(s) to be submitted in this application (if applicable).  
請列出就本申請提交的補充文件(如適用)。

1. I/We hereby agree and declare that:
  - (i) I/We have operated/taught in Hong Kong for at least one year.
  - (ii) The submitted Project did not contain any direct sales and marketing of products or services, and was not fully funded by the Investor and Financial Education Council (IFEC).
  - (iii) I/We have obtained a written consent from my/our school to submit this application. (This sub-paragraph 1(iii) only applies to teacher applicants.)
  - (iv) I/We have obtained the written consent from all other co-organiser(s) who are not joint applicants to submit the co-organised Project for the application of the Investor and Financial Education Award 2022 (IFEA 2022). (This sub-paragraph 1(iv) only applies to a sole company/organisation applicant of a Project co-organised with other organisation(s)).
  - (v) All information provided in this application form is complete, true and accurate. I/We will provide all supporting materials and information upon request by the IFEC. I/We agree that if (i) there is misrepresentation or omission in the information provided or failure to provide the requested documents/information or (ii) I/we have not obtained a written consent from my/our school to submit this application as set out under sub-paragraph 1(iii) above (if applicable), this application may be rejected and the IFEA 2022 or the Certificate of Appreciation awarded/presented to me/us may be forfeited.
2. I/We permit the IFEC to reproduce copies of the submitted documents and information for the purposes of processing and assessing the application. I/We permit the IFEC to distribute, disseminate, publish and/or reproduce the submitted documents and information, including but not limited to any personal data (such as the names, positions and website address), via various channels (such as websites, mass media, social media platforms, publications and other public channels for the purposes of announcing and reporting the results of the IFEA 2022), should I/we be a recipient of the IFEA 2022 or the Certificate of Appreciation.
3. I/We agree that the IFEC can use the submitted documents and information for data analysis on a collective basis for future development of the Investor and Financial Education Award.
4. I/We declare that I/we have read and fully understand and agree with the contents of the Privacy Policy Statement of the IFEC (<https://www.ifec.org.hk/web/en/other-resources/privacy-policy.page>) and the Personal Information Collection Statement (PICS) as stated on the last page of this application form. I/We declare that I/we have obtained all necessary consent and authorisation from my/our staff, team members or other persons as applicable to provide their personal data to the IFEC for the use as stated in the PICS and in this Part 4.
5. I/We acknowledge and agree that the IFEC and its staff, the members of the Assessment Committees, IFEC's appointed agencies and their sub-contractors shall not be liable for any damage, loss, liability, action, proceedings, claim, demand, costs or expenses suffered by or brought against any applicants of the IFEA 2022 or any other person arising out of or in relation to the IFEA 2022.
6. I/we acknowledge and agree that all decisions made by the IFEC and the Assessment Committees regarding this application are final and conclusive.
7. I/we understand that I/we am/are permitted to use the name/logo of the IFEA 2022 award designation as shown on the cover page of the Investor and Financial Education Award 2022 Application Guide on my/our company/organisation's promotional materials and website for one year commencing on the date of 1 December 2022, should I/we be a recipient of the IFEA 2022. I/we will not use the logo, name and trademarks of the IFEC and IFEA 2022 for any other purposes save as permitted in this paragraph 7. I/we understand and agree that I/we will be liable and will bear any consequences to the IFEC for any unauthorised use of the logo, name, and trademarks of the IFEC and IFEA 2022. For the avoidance of doubt, nothing in this paragraph 7 shall be construed as permitting co-organiser(s) who are not joint applicant(s) to use the name, logo and trademarks of the IFEC and IFEA 2022 in any way.
8. In the event of any conflict or inconsistency of the English and Chinese versions of this application form and the Investor and Financial Education Award 2022 Application Guide, the English version shall prevail.

☐ By checking this box and signing below, I/we (as the applicant(s) and joint applicant(s) (if applicable)) confirm that I/we have read, fully understand and agree to be bound by the terms and declarations set out in paragraphs 1 to 8 of this Part 4 and the Investor and Financial Education Award 2022 Application Guide. In addition, where this application is submitted by a company/organisation applicant, each of the signatories below confirms that he/she has obtained a written consent from his/her company/organisation to submit and sign this application for and on its behalf, and agrees that if this application is submitted without such written consent, this application may be rejected and the IFEA 2022 or the Certificate of Appreciation awarded/presented to his/her company/organisation may be forfeited.

1. 本人／吾等謹此同意並聲明：
    - (i) 本人／吾等於香港營運／任教達一年或以上。
    - (ii) 於本表格提交的教育項目沒有包含任何產品或服務的直接營銷及推廣成份，及並非由投資者及理財教育委員會（投委會）全數資助。
    - (iii) 本人／吾等已取得本人／吾等學校之書面同意提交此申請。（此分段1(iii)只適用於教師申請者）
    - (iv) 本人／吾等已取得所有非聯合申請者的合辦機構之書面同意就合辦教育項目申請「投資者及理財教育獎2022」。（此分段1(iv)只適用於與其他機構合辦教育項目的單獨公司／機構申請者）
    - (v) 於本申請表格提供的資料均為完整、真實及正確。本人／吾等將會因應投委會要求提供所有補充文件及資料。本人／吾等同意如(i)所提供的資料有虛報或遺漏，或沒有提供所要求的文件／資料，或(ii)本人／吾等未有就分段1(iii)所述取得本人／吾等學校之書面同意提交此申請（如適用），此申請將可能被拒絕及授予本人／吾等的「投資者及理財教育獎2022」或感謝狀將可能被褫奪。
  2. 本人／吾等准許投委會複印所提交的文件及資料作處理及評審此申請之用。如本人／吾等成為「投資者及理財教育獎2022」或感謝狀獲發者，本人／吾等准許投委會分發、發布、印行及／或複製所提交的文件及資料，包括但不僅限於任何個人資料（例如姓名、職位、網址），在不同渠道（如網站、大眾媒體、社交平台、刊物及其他公眾渠道）作宣布及報告「投資者及理財教育獎2022」的結果之用。
  3. 本人／吾等同意投委會可使用提交的文件及資料進行整體分析，作為未來「投資者及理財教育獎」發展之用。
  4. 本人／吾等聲明本人／吾等已閱讀、充分明白及同意投委會的私隱政策聲明 (<https://www.ifec.org.hk/web/tc/other-resources/privacy-policy.page>) 的內容，及本申請表格最後一頁之個人資料收集聲明（個人資料收集聲明）。本人／吾等聲明本人／吾等已取得本人／吾等職員或其他一方所需的同意及授權提供其個人資料作個人資料收集聲明及本第四部分中所述的用途。
  5. 本人／吾等知悉及同意投委會及其職員、評審委員會成員、投委會的委任機構和其分包商不會向「投資者及理財教育獎2022」之任何申請者或任何其他人士就或由「投資者及理財教育獎2022」所引致而蒙受或遭他人提出的損害、損失、法律責任、訴訟、法律程序、申索、要求、費用或開支，而負有任何責任。
  6. 本人／吾等確認及同意投委會及評審委員會就有關本申請作出的決定是最終及具決定性的。
  7. 本人／吾等明白如本人／吾等獲頒「投資者及理財教育獎2022」，本人／吾等被准許自2022年12月1日起一年內於本人所屬／本公司／機構的宣傳材料及網頁中使用於「投資者及理財教育獎2022」申請指引封面所顯示的「投資者及理財教育獎2022」的名稱／標誌。本人／吾等不會將投委會和「投資者及理財教育獎2022」的標誌、名稱和商標作任何其他用途，除非本第7段所准許的情況外。本人／吾等明白並同意本人／吾等會就未經授權使用投委會和「投資者及理財教育獎2022」的標誌、名稱和商標向投委會承擔責任及任何後果。為免生疑問，本第7段中的任何內容均不得在任何方面解釋為准許非聯合申請者的合辦機構使用投委會和「投資者及理財教育獎2022」的名稱、標誌和商標。
  8. 本申請表格及「投資者及理財教育獎2022」申請指引之中英文版本如有任何抵觸或不相符之處，應以英文版本為準。
- ☐ 藉勾選此空格及在以下簽署，本人／吾等（作為申請者及聯合申請者（如適用））確認本人／吾等已閱讀、充分理解及同意在此第四部份中第1至8段所列的條款及聲明和「投資者及理財教育獎2022」申請指引。此外，如本申請由公司／機構申請者提交，以下每名簽署代表確認已獲得其公司／機構的書面同意，以代表其公司／機構提交及簽署本申請，並同意如在未經此等書面同意的情況下提交本申請，本申請將可能被拒絕及授予其公司／機構的「投資者及理財教育獎2022」或感謝狀將可能被褫奪。

For company/organisation applicants  
供公司／機構申請者

\_\_\_\_\_  
Name of signatory  
代表姓名

\_\_\_\_\_  
Signature  
簽署

\_\_\_\_\_  
Position  
職銜

\_\_\_\_\_  
Date  
日期

\_\_\_\_\_  
Company/Organisation chop  
公司／機構蓋印

For joint applicants (Please attach sheet if there are more than two joint applicants.)  
供聯合申請者(如多於兩位聯合申請者,請另紙書寫。)

1. Please select the award category applied for:  
請選擇申請獎項的類別:

☐ IFEA (Corporate)  
投資者及理財教育獎(企業)

☐ IFEA (Public/Professional Body and NGO)  
投資者及理財教育獎(公共／專業機構及非政府機構)

\_\_\_\_\_  
Name of 1<sup>st</sup> joint applicant  
第一聯合申請者名稱

\_\_\_\_\_  
Name of signatory  
代表姓名

\_\_\_\_\_  
Signature  
簽署

\_\_\_\_\_  
Position  
職銜

\_\_\_\_\_  
Email  
電郵

\_\_\_\_\_  
Company/Organisation chop  
公司／機構蓋印

\_\_\_\_\_  
Telephone  
電話

\_\_\_\_\_  
Date  
日期

2. Please select the award category applied for:  
請選擇申請獎項的類別:

☐ IFEA (Corporate)  
投資者及理財教育獎(企業)

☐ IFEA (Public/Professional Body and NGO)  
投資者及理財教育獎(公共／專業機構及非政府機構)

\_\_\_\_\_  
Name of 2<sup>nd</sup> joint applicant  
第二聯合申請者名稱

\_\_\_\_\_  
Name of signatory  
代表姓名

\_\_\_\_\_  
Signature  
簽署

\_\_\_\_\_  
Position  
職銜

\_\_\_\_\_  
Email  
電郵

\_\_\_\_\_  
Company/Organisation chop  
公司／機構蓋印

\_\_\_\_\_  
Telephone  
電話

\_\_\_\_\_  
Date  
日期



For teacher applicants  
供教師申請者

\_\_\_\_\_  
Name of Teacher/Team Leader  
教師／隊長姓名

\_\_\_\_\_  
Signature  
簽署

\_\_\_\_\_  
Position  
職銜

\_\_\_\_\_  
Date  
日期

\_\_\_\_\_  
School chop  
學校蓋印

For team applicants  
供教師團隊申請者

1.

\_\_\_\_\_  
Name of team member  
團隊成員姓名

\_\_\_\_\_  
Signature  
簽署

\_\_\_\_\_  
Position  
職銜

\_\_\_\_\_  
Date  
日期

2.

\_\_\_\_\_  
Name of team member  
團隊成員姓名

\_\_\_\_\_  
Signature  
簽署

\_\_\_\_\_  
Position  
職銜

\_\_\_\_\_  
Date  
日期

3.

\_\_\_\_\_  
Name of team member  
團隊成員姓名

\_\_\_\_\_  
Signature  
簽署

\_\_\_\_\_  
Position  
職銜

\_\_\_\_\_  
Date  
日期

4.

\_\_\_\_\_  
Name of team member  
團隊成員姓名

\_\_\_\_\_  
Signature  
簽署

\_\_\_\_\_  
Position  
職銜

\_\_\_\_\_  
Date  
日期

## Personal Information Collection

1. This Personal Information Collection Statement is made in accordance with the guidelines issued by the Privacy Commissioner for Personal Data. It sets out the purposes for which your Personal Data<sup>1</sup> will be used following collection, what you are agreeing to with respect to the Investor and Financial Education Council's (IFEC) use of your Personal Data and your rights under the Personal Data (Privacy) Ordinance (Cap. 486) (PDPO).

## Purpose of collection

2. Your provision of Personal Data is on a voluntary basis and failure to provide your Personal Data may affect the processing and outcome of this application. The Personal Data provided in this application form will only be used by the IFEC, the Assessment Committees, IFEC's appointed agencies and their sub-contractors for the purpose of processing and assessing your application for the Investor and Financial Education Award 2022 (IFEA 2022) and making public announcements and reports of the results of the IFEA 2022 applications.

## Transfer of personal data

3. IFEC will not disclose or transfer your personal data to third parties other than the Assessment Committees, IFEC's appointed agencies and their sub-contractors without your prior consent.

## Access to data

4. You have the right to request access to and correction of your Personal Data in accordance with the provisions of the PDPO. Your right of access includes the right to obtain a copy of your Personal Data provided in your submission on this application form. The IFEC has the right to charge a reasonable fee for processing any data access request.

## Retention

5. Personal Data provided to the IFEC in your submission on this application will be retained for such period as may be necessary for the fulfilment of the above-stated purpose(s) (including any directly related purpose).

## Enquiries

6. Any enquiries regarding the Personal Data provided in your submission on this application, or requests for access to Personal Data or correction of Personal Data, should be addressed in writing to:

Data Privacy Officer  
Investor and Financial Education Council  
54/F, One Island East  
18 Westlands Road, Quarry Bay, Hong Kong

<sup>1</sup>Personal Data means personal data as defined in the Personal Data (Privacy) Ordinance (Cap. 486)

## 個人資料收集聲明

1. 本個人資料收集聲明是按照個人資料私隱專員發出的指引編寫而成。本聲明列出投資者及理財教育委員會(投委會)收集你的個人資料<sup>1</sup>的用途、你就投委會使用你的個人資料而同意的事項,以及你根據《個人資料(私隱)條例》(第486章)(「《私隱條例》」)享有的權利。

## 收集資料的目的

2. 你個人資料的提供是屬於自願性質,未能提供你的個人資料可能影響此申請的處理及結果。投委會、評審委員會、投委會的委任機構及其分包商會為在處理及評審「投資者及理財教育獎2022」申請時及就「投資者及理財教育獎2022」的申請結果作出公眾宣布和報告的目的,使用你就申請向投委會所提供的個人資料。

## 轉移個人資料

3. 投委會不會在未經你事先同意前把你就本申請向投委會所提供的個人資料轉移至評審委員會、投委會的委任機構及其分包商以外的第三方人士。

## 查閱資料

4. 按照《私隱條例》的規定,你有權要求查閱及修正你的個人資料。上述權利包括你有權索取你就本申請向投委會所提供的個人資料的副本。投委會有權就處理任何查閱資料的要求收取合理的費用。

## 保留資料

5. 投委會會保留就申請而提供予投委會的個人資料,保留時間為直至完成以上提述的目的(包括任何直接有關的目的)所需的時間為止。

## 查詢

6. 有關就本申請所提供的個人資料的任何查詢,或查閱或修正個人資料的要求,請以書面形式向以下人士提出:

香港鰂魚涌華蘭路18號  
港島東中心54樓  
投資者及理財教育委員會  
個人資料隱私主任

<sup>1</sup>個人資料指《個人資料(私隱)條例》(第486章)所界定的「個人資料」。

## Submission 遞交方法

Please email to [flstrategy@ifec.org.hk](mailto:flstrategy@ifec.org.hk) and mark  
“Investor and Financial Education Award 2022 Submission” in the email subject.

請電郵至[flstrategy@ifec.org.hk](mailto:flstrategy@ifec.org.hk)  
並註明標題「投資者及理財教育獎2022」。



## INVESTOR AND FINANCIAL EDUCATION COUNCIL


### 投資者及理財教育委員會

The Investor and Financial Education Council (IFEC) is an independent public organisation and a subsidiary of the Securities and Futures Commission, dedicated to improving financial literacy in Hong Kong. The IFEC is supported by the four regulators and the Education Bureau.

The IFEC promotes and delivers free and impartial investor and financial education resources and programmes through its consumer education platform, The Chin Family, and leads the Financial Literacy Strategy to create a conducive environment for stakeholders to deliver more quality investor and financial education to various segments of the Hong Kong population.

投資者及理財教育委員會（投委會）是證券及期貨事務監察委員會轄下一間獨立的公營機構，專責提升香港市民的理財能力，並獲四家金融監管機構及教育局支持。

投委會透過消費者教育平台「錢家有道」推廣及提供免費和持平公正的投資者及理財教育資源及計劃，並帶領「理財能力策略」為持份者締造有利環境，從而為香港不同群組提供更多優質的投資者和理財教育。





## Investor and Financial Education Council

54/F One Island East  
18 Westlands Road  
Quarry Bay, Hong Kong

## 投資者及理財教育委員會

香港鰂魚涌華蘭路18號  
港島東中心54樓



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