

報名表格

截止報名日期

Application Deadline

APPLICATION FORM

12 / 10 / 2026

請將填妥及簽署的報名表格，連同第三部分所列明的補充文件，電郵至 award@ifec.org.hk。

Please submit the completed and signed application form, with the supplementary document specified in Part 3, to award@ifec.org.hk.

第一部份

申請機構資料

PART 1

DETAILS OF APPLICANT ORGANISATION

☐ 單獨申請 Individual Application

☐ 聯名申請（適用於涉及多過一間機構的項目，而其中另一間或多間機構有意成為聯合申請人的情況。）

Joint Application (For a project involving more than one organisation where one or more organisations intend to be joint applicants.)

主要申請機構名稱 (必須與註冊文件上名稱相同):

Name of the Primary Applicant Organisation (must be the same as shown on the registration documents):

中文

English

獎項類別將根據主要申請機構的性質進行劃分。

The award category will be classified by the nature of the primary applicant organisation.

機構性質 Nature of Organisation:

☐ 企業 Corporation

☐ 政府決策局 / 部門 Government bureau / department

☐ 法定組織 Statutory body

☐ 公營組織 Public body

☐ 專業團體 Professional body

☐ 非政府機構 Non-governmental organisation

☐ 幼稚園、小學或中學 Kindergarten, Primary or Secondary School

☐ 專上院校 – 請註明學系/部門 Tertiary Institution, please specify faculty/department: _____

☐ 其他，請註明 Others, please specify: _____

機構網址 Organisation Website

機構在提交申請時已在香港運作至少一年。

The organisation has been operating in Hong Kong for at least one year at the time of application.

☐ 是 Yes / ☐ 否 No

主要聯絡人資料 (用於查詢及獎項通知) Primary Contact Person Information (for inquiries and award notifications)	
稱謂 Title: ☐ 教授 Professor ☐ 博士 Doctor ☐ 先生 Mr ☐ 女士 Ms ☐ 其他 (請列明) Others (please specify)	
姓名 (中文)	
Name (English)	
職銜 Job Title	
電話 Telephone	
電郵 Email	

聯名申請機構資料 (如沒有，請直接前往第二部分) Joint Applicant Organisation Information (If none, please proceed to Part 2)	
聯名申請機構必須簽署於第四部分的聲明。該機構將在所獲頒的獎項中獲得認可。 The joint applicant organisation must sign the Declaration in Part 4. It will be recognised in the award presented.	
聯名申請機構名稱 (必須與註冊文件上名稱相同): Name of the Joint Applicant Organisation (must be the same as shown on the registration documents):	
中文	
English	
機構性質 Nature of Organisation: ☐ 企業 Corporation ☐ 政府決策局 / 部門 Government bureau / department ☐ 法定組織 Statutory body ☐ 公營組織 Public body ☐ 專業團體 Professional body ☐ 非政府機構 Non-governmental organisation ☐ 幼稚園、小學或中學 Kindergarten, Primary or Secondary School ☐ 專上院校 – 請註明學系/部門 Tertiary Institution, please specify faculty/department: _____ ☐ 其他，請註明 Others, please specify: _____	
機構網址 Organisation Website	
機構在提交申請時已在香港運作至少一年。 The organisation has been operating in Hong Kong for at least one year at the time of application. ☐ 是 Yes / ☐ 否 No	

第二部份 項目資料 PART 2 DETAILS OF PROJECT	
項目名稱	
Name of Project	
項目實施日期 Project Implementation Period	
由 Start from :	至 To :
請回答以下問題 Please respond to the following questions	
誰是項目的目標受惠者？ Who are the target beneficiaries of the project?	
請註明項目的教育內容符合哪一個「 香港理財能力架構 」所列的核心能力主題？（可選擇多項） Please indicate which of the core competency theme(s) outlined in the “ Hong Kong Financial Competency Framework ” the educational content of the project aligns with. (Multiple selections allowed)	
☐ 金錢和銀行 Money and Banking ☐ 收入和稅項 Income and Taxation ☐ 儲蓄和投資 Saving and Investing ☐ 開支和信貸 Spending and Credit ☐ 消費者權利和責任 Consumer Rights and Responsibilities ☐ 財務策劃 Financial Planning ☐ 保障和風險 Protection and Risk	
項目是否免費提供？ Is the project provided for free?	
☐ 是 Yes / ☐ 否 No	
項目是否涉及直接營銷或推廣任何產品或服務？ Does the project involve direct marketing or promotion of any products or services?	
☐ 是 Yes / ☐ 否 No	
項目是否由投資者及理財教育委員會（ 投委會 ）全額資助？ Is the project fully funded by the Investor and Financial Education Council (IFEC)?	
☐ 是 Yes / ☐ 否 No	

請提交一份 PDF 格式的補充文件，頁數上限為 15 頁*，檔案總大小不可超過 15 MB，內容需涵蓋以下資料：

- 申請者及其他參與項目機構的角色。
- 項目的主要目的。
- 項目的實施細節。
- 項目的成果目標，包括受惠者人數、評估結果、成效測量等。
- 其他補充資料的有關連結，例如網站、社交媒體帖子、影像、影片等。

*請注意，任何超過第 15 頁的內容將不會被納入評估範圍。

Please submit a supplementary document in PDF format, limited to a maximum of 15 pages* and a total file size of no more than 15 MB, covering the following information:

- The role(s) of the applicant(s) and any other parties involved in the project.
- The main objectives of the project.
- The implementation details of the project.
- The targets of the project, including the number of beneficiaries reached, evaluation results, impact measurements, etc.
- Relevant links to any supporting materials, such as websites, social media posts, images, videos, etc.

*Please note that any content exceeding page 15 will not be considered for assessment.

1. 吾等謹此同意並聲明於本申請表格提供的資料均為完整、真實及正確。吾等將會因應投委會要求提供所有補充文件及資料。吾等同意如所提供的文件或資料有虛報或遺漏，此申請將可能被拒絕及授予吾等的「投資者及理財教育獎 2026」或感謝狀（統稱為獎項）將可能被褫奪。

We hereby agree and declare that all information provided in this application form is complete, true and accurate. We will provide all supporting materials and information upon request by the IFEC. We agree that if there are misrepresentations or omissions in the materials or information provided, this application may be rejected and the IFEA 2026 or the Certificate of Appreciation (collectively, Awards) given/presented to us may be forfeited.

2. 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。如吾等成為獎項獲發者，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（例如姓名及職銜），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 2026」的結果之用。吾等准許投委會將所提交的文件及資料（包括個人資料，如聯絡詳情）提供予投委會的委任機構和其分包商，以便就本申請、任何獲頒獎項及領獎安排之事宜向吾等查詢、與吾等聯絡及／或溝通。

We permit the IFEC to reproduce copies of the submitted documents and information for the purposes of processing and assessing the application. 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 names and job titles), 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 2026) should we be a recipient of the Award(s). We permit the IFEC to provide the submitted documents and information (including personal data such as contact details) to the IFEC's appointed agencies and their sub-contractors for the purposes of inquiring, contacting and/or communicating with us regarding this application and any Award receiving and collection arrangements.

3. 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。

We agree that the IFEC can use the submitted documents and information for data analysis on a collective basis for the future development of the Investor and Financial Education Award.

4. 吾等聲明吾等已閱讀、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>）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）的內容。吾等聲明吾等已取得吾等職員及其他相關人士所需的同意及授權向投委會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。

We declare that 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. We declare that we have obtained all necessary consent and authorisation from our staff and other relevant persons to provide their personal data to the IFEC for the purposes stated in the PICS and in this Part 4.

5. 吾等知悉及同意投委會及其職員、「投資者及理財教育獎 2026」評審委員會（**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 2026」之任何申請者或任何其他人士因「投資者及理財教育獎 2026」或與其相關而蒙受或遭他人提出的任何損害、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。

We acknowledge and agree that the IFEC and its staff, the members of the assessment committees of the Investor and Financial Education Award 2026 (**Assessment Committees**), the 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 2026 or any other person arising out of or in relation to the IFEA 2026.

6. 吾等確認及同意投委會就有關本申請作出的決定是最終及具決定性的。

We acknowledge and agree that all decisions made by the IFEC regarding this application are final and conclusive.

7. 申請表格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。

In the event of any conflict or inconsistency between the English and Chinese versions of this application form, the English version shall prevail.

- ☐ 藉勾選此空格及在以下簽署，吾等（作為申請者及聯合申請者（如適用））確認吾等已閱讀、充分理解及同意在此第四部份中第 1 至 7 段所列的條款及聲明。此外，以下每名簽署代表確認已獲得其機構的授權，以代表其機構提交及簽署本申請，並同意如在未經此等授權的情況下提交本申請，本申請將可能被拒絕及授予其機構的獎項將可能被褫奪。

By checking this box and signing below, we (as the applicant(s) and joint applicant(s) (if applicable)) confirm that we have read, fully understand and agree to be bound by the terms and declarations set out in paragraphs 1 to 7 of this Part 4. In addition, each of the signatories below confirms that he/she has been duly authorised by his/her organisation to submit and sign this application for and on its behalf, and agrees that if this application is submitted without such authorisation, this application may be rejected and any Awards given/presented to his/her organisation may be forfeited.

代表主要申請機構簽署連機構蓋章
Signature with organisation chop
On Behalf of Primary Applicant Organisation

代表聯合申請機構簽署連機構蓋章（如適用）
Signature with organisation chop
On Behalf of Joint Applicant Organisation
(if applicable)

簽署人姓名 Name of Signatory

簽署人姓名 Name of Signatory

簽署人職銜 Job Title of Signatory

簽署人職銜 Job Title of Signatory

日期 Date

日期 Date

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¹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。

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 Data¹ 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).

收集資料的目的 Purpose of collection

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僅會使用你在本申請中向投委會所提供的個人資料作以下用途：

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. Your Personal Data provided in this application will only be used by the IFEC, the Assessment Committees, the IFEC's appointed agencies and their sub-contractors for the following purposes:

- (a) 處理及評審「投資者及理財教育獎 2026」申請；
processing and assessing your application for the Investor and Financial Education Award 2026 (IFEA 2026);
- (b) 就「投資者及理財教育獎 2026」的申請結果作出公眾宣布和報告；
making public announcements and reports of the results of the IFEA 2026 applications;
- (c) 就本申請及所獲獎項及領獎安排之事宜向你查詢、與你聯絡及/或溝通；
inquiring, contacting and/or communicating with you regarding your application, the award presented and the award collection arrangements;
- (d) 就「投資者及理財教育獎」的未來發展進行綜合數據分析；及
performing data analysis on a collective basis for the Investor and Financial Education Award's future development; and
- (e) 與上述相關的任何附帶或相關目的，以及法律容許的任何其他目的。
any incidental or associated purposes relating to the above, and any other purposes as permitted by law.

轉移個人資料 Transfer of Personal Data

3. 你的個人資料可能會被轉移到香港以外的地方作所需使用、處理或儲存（該等地方可能會或可能不會提供與香港相同或相似程度的個人資料保障）。

Your Personal Data may be transferred to places outside of Hong Kong for necessary handling, processing or storage (such places may or may not offer the same or a similar level of personal data protection as in Hong Kong).

4. 除非法律有所規定或容許，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披露予或轉移至評審委員會、投委會的委任機構及其分包商以外的第三方人士。

The IFEC will not disclose or transfer your Personal Data to third parties other than the Assessment Committees, the IFEC's appointed agencies and their sub-contractors without your prior consent, unless required or permitted by law.

查閱及修正資料 Access to and correction of data

5. 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。

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. The IFEC has the right to charge a reasonable fee for processing any data access request.

¹ Personal Data means "personal data" as defined in the PDPO.

個人資料指《私隱條例》所界定的「個人資料」。

保留資料 Retention

6. 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。

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).

查詢 Enquiries

7. 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：

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:

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

Data Privacy Officer

Investor and Financial Education Council

54/F, One Island East

18 Westlands Road, Quarry Bay, Hong Kong

投委會的私隱政策聲明副本可於以下網址瀏覽：<https://www.ifec.org.hk/web/tc/other-resources/privacy-policy.page>。

A copy of the Privacy Policy Statement adopted by the IFEC is available at <https://www.ifec.org.hk/web/en/other-resources/privacy-policy.page>.