

## Application Form – Corporate Membership

We apply to be a corporate member of the Hong Kong Trustees' Association Ltd ("HKTA") and agree to be bound by the **provisions of its Memorandum and Articles of Association** as posted on its website.

**Membership Fee:** HK\$4,000 p.a. (per corporate membership)

**Name of Applicant:** \_\_\_\_\_

**Address:** \_\_\_\_\_  
\_\_\_\_\_

**Telephone:** \_\_\_\_\_

**Fax:** \_\_\_\_\_

**Company Website:** \_\_\_\_\_

**Place of Incorporation:** \_\_\_\_\_

**Business Registration No.:** \_\_\_\_\_ (Please attach a copy)

**Year of Establishment:** \_\_\_\_\_

**What Regulatory / Licensing Regime are you operating under?** (Please attach a copy of your license, if applicable)

- |  |  |
|--|--|
| <input type="checkbox"/> Hong Kong Trustee Ordinance               | <input type="checkbox"/> Securities & Futures Ordinance  |
| <input type="checkbox"/> Trust & Company Service Provider          | <input type="checkbox"/> Others (please specify) : _____ |
| <input type="checkbox"/> Mandatory Provident Fund Scheme Ordinance | _____  |

The following information is requested for the purpose of maintaining important data about the trust industry. Any information provided is to be kept anonymous and confidential, and it will only be used on an aggregate basis and for the aforesaid purpose. (To get a better understanding about the data collection policy of HKTA, you are kindly suggested to browse the "Personal Information Collection Statement for Members and Prospective Members" on our website.)

**Type of your organization:**

- Independent trust company
- Bank or subsidiary of a bank
- Law firm
- Accounting or tax services firm
- Corporate services firm
- Family office
- Independent financial adviser
- Charitable trust company
- Others (please specify) : \_\_\_\_\_

**Nature of your mainstream business:**

- Trust services
- Commercial banking
- Private banking services
- Professional services
- Administration services
- Company services
- Advisory
- Others (please specify): \_\_\_\_\_

**No. of employees in Hong Kong engaged in your mainstream business:** \_\_\_\_\_

**Size of assets currently under your trusteeship (if applicable):** US\$ \_\_\_\_\_

**Who is/are in charge of trust business in your organization?**

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**For those in charge of your trust business, please provide a brief description of their credentials, qualifications, working experience in the trust sector and years of such experience etc :**

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**Have the Trust Law reforms introduced in Hong Kong since 2013 contributed to your trust business growth? \_\_\_\_\_ If yes, how much is the net increase in trust asset value? Roughly US\$ \_\_\_\_\_**

**Contact Details**

**Name of Primary Representative :..... whose signature**

**is :.....**

**Title :.....**

**Telephone :.....**

**Fax :.....**

**Email address :.....**

**Name of Secondary Representative (if applicable) :.....**

**Title :.....**

**Telephone :.....**

**Fax :.....**

**Email address :.....**

**HKTA Best Practice Guides**

We confirm that, as part of this application, we will adopt as our minimum standards of practice when acting as trustees one or more of the HKTA Best Practice Guides (as indicated below) and that we will, in the conduct of our business as trustees, observe and perform the Guiding Principles as therein described to the best of our abilities.

- Best Practice Guide for Trustees of Pension Schemes \*
- Best Practice Guide for Trustees of Corporate Trusts \*
- Best Practice Guide for Trustees of Private Trusts \*
- Best Practice Guide for Trustees of Charitable Trusts \*

*\* Please tick where appropriate.*

*We acknowledge that it should not be inferred or understood from our adoption of the HKTA Best Practice Guides (as indicated above) or from any statement by us that we have adopted such Best Practice Guides or observe and perform the standards of practice or Guiding Principles therein contained or described, that the HKTA endorses us or our standard of performance or otherwise in the conduct of our activities as trustee.*

Not applicable (for a member who does not act as a trustee)

~The End~

**Note from the HKTA:**

- 1. Please provide a brief description of the corporate profile and/or the credentials, qualifications, working experience in the trust sector and years of such experience etc. of any key person. We shall keep such information strictly confidential and would use it solely for considering your membership application.**
- 2. Please also note that Hong Kong Trustees' Association Ltd is not a regulatory body but an industry group representing the trust industry. If any member is to refer to its HKTA membership in any of its corporate document or website, please do not deviate from the following wording: "We are a member of the Hong Kong Trustees' Association Ltd".**
- 3. Your form may not be processed if it is not duly completed. For items that are not relevant to you, please mark "N/A" rather than leaving them as blank.**