

Application Form – Individual Membership

PART A		PERSONAL PARTICULARS	
Title: <input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Dr (pls tick as appropriate)			
Name in English *		Name in Chinese (if applicable)	
Residential Address:		E-Mail Address *:	
Office Address:		Office Phone No:	
Correspondence Address:	<input type="checkbox"/> Residential <input type="checkbox"/> Office (pls tick as appropriate)	Mobile No *:	
* Mandatory field			

PART B		EMPLOYMENT DETAILS (if Applicable)	
Current Employer:		Department:	
Job Title:		Department:	
Other Details	(pls tick as appropriate)		
Organisation	<input type="checkbox"/> Independent trust company <input type="checkbox"/> Banking <input type="checkbox"/> Law Firm <input type="checkbox"/> Accounting or tax services firm <input type="checkbox"/> Corporate services firm <input type="checkbox"/> Family Office <input type="checkbox"/> Independent financial adviser <input type="checkbox"/> Charitable trust company <input type="checkbox"/> Others (please specify) : _____		
Position			
Previous Employer:		Department:	
Job Title:		Department:	
Other Details	(pls tick as appropriate)		
Organisation	<input type="checkbox"/> Independent trust company <input type="checkbox"/> Banking <input type="checkbox"/> Law Firm <input type="checkbox"/> Accounting or tax services firm <input type="checkbox"/> Corporate services firm <input type="checkbox"/> Family Office <input type="checkbox"/> Independent financial adviser <input type="checkbox"/> Charitable trust company <input type="checkbox"/> Others (please specify) : _____		
Position			

PART C: ACADEMIC/ PROFESSIONAL QUALIFICATIONS / INDUSTRY ASSOCIATION MEMBERSHIP

Professional Bodies/University/Tertiary Institution	Qualification obtained	Date of Award

Industry Association	Type of Membership

PART D: DECLARATION AND ACKNOWLEDGEMENT

1. I declare that the information provided in this form is true and correct in all respects.
2. I understand that as a member of the HKTA I shall be bound by the prevailing Articles of Association.
3. I have read the **“Notes for Membership Application” under Part E** before completing this form.
4. In regard to Personal Information Collection and Data Privacy Statement, I hereby undertake to update the HKTA if there are any changes to my personal data or circumstances which may have a material impact on my membership application or status. I further :
 - (a) authorize the HKTA to share all information in connection with my application with any designated persons as may be required from time to time to access my eligibility for this application;
 - (b) authorize the HKTA and any designated persons to contact my current employer, my previous employers, educational institutions, industry associations or regulatory authorities in order to verify the information provided in this application; and
 - (c) agree that the HKTA may contact me about seminars and courses they hold or which other associations may hold and which The HKTA believe may be of interest to me.

Or

- I do not agree to authorize the HKTA regarding points (a), (b) and (c) above.
5. I confirm that, as part of this application, I will adhere to the minimum standards of practice when performing the functions of trustees with one or more of the HKTA Best Practice Guides (as indicated below) and that I will, in the conduct of carrying out the duties of trustees and where applicable, observe and perform the Guiding Principles as therein described to the best of my 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 *
 - Not applicable (*Please provide reasons for checking this box*) _____

* Please tick where appropriate.

I acknowledge that it should not be inferred or understood from my adherence of the HKTA Best Practice Guides (as indicated above) or from any statement by me that I have adhered to such Best Practice Guides or observe and perform the standards of practice or Guiding Principles therein contained or described, that the HKTA endorses me or my standard of performance or otherwise in the carrying out of my duties or activities as trustee.

6. I declare that I am a fit and proper person and have **No**

Conviction Records under

- the Anti-Money Laundering and Counter-Terrorist Financing Ordinance (Chapter 615)(AMLO);
- section 14 of the United Nations (Anti-Terrorism Measures) Ordinance (Chapter 575);
- section 25(1), 25A(5) or (7) of, or an offence specified in Schedule 1 to, the Drug Trafficking (Recovery of Proceeds) Ordinance (Chapter 405); and
- section 25(1), 25A(5) or (7) of, or an offence specified in Schedule 1 or 2 to the Organized and Serious Crimes Ordinance (Chapter 455).

- Non-Compliance records of any requirement imposed under the AMLO or regulation made by the Registrar of Companies under section 53ZM of the AMLO.
- Bankruptcy Record and is not subject to any bankruptcy proceedings under the Bankruptcy Ordinance (Chapter 6).

7. I confirm that I have read and understood the requirements and information in this Application, including the Personal Information Collection and Data Privacy Statement set out in the HKTA website at www.hktrustees.com and consent to the terms and conditions therein..

Signature

Date

PART E: NOTES FOR MEMBERSHIP APPLICATION

1. Membership Fee is HK\$2,000 per annum payable at the time of the Application. Any membership fee paid is non-refundable and non-transferable.
2. Membership is subject to renewal on an annual basis (based on calendar year).
3. Current members who fail to pay the membership renewal fee on or before **31st January of each calendar year** will be treated as default members. If the default member is seeking reinstatement of membership, the defaulting member is required to pay the membership renewal fee for the current year plus a Re-registration Fee of HK\$1,000.
4. Members can send their Membership Application Form to the HKTA by post only
5. All payment should be made via Cheque or e-Cheque payable to "HK Trustees' Association Ltd"
6. Personal Information Collection and Data Privacy Statement: The HKTA undertakes to keep your personal information confidential, stored in a secured environment, and shall not use your personal data for any purpose other than that intended by this application, without your express permission.

PART F: CHECKLIST

Before submitting the form, please ensure that:

(Please put a tick in the appropriate boxes)

- you have completed this Membership Application Form.
- you have signed and dated the Declaration and Acknowledgement.
- you have enclosed a cheque payable to the "HK Trustees' Association Ltd".
- you have read the **Notes for Membership Application**

FOR OFFICE USE ONLY

Paid by Cheque/e-Cheque No:	Received by	Verified by	Membership No	Confirmation sent
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