



投資者及理財教育委員會  
Investor and Financial  
Education Council

Dear IFEC friends

**Re: Invitation of nomination to be Financial Literacy Strategy Supporting Organisation**

The [Financial Literacy Strategy 2019](#) was launched by the Investor and Financial Education Council (IFEC) in January 2019.

The Vision of the Strategy is to empower the people of Hong Kong to make informed and responsible financial decisions for themselves and their families. An enhanced capability to manage money and deal with different socio-economic challenges will ultimately contribute to better overall financial well-being. This benefits not only individuals, but also many organisations and society at large.

Organisations that believe in the importance of financial literacy and the Financial Literacy Strategy sign up to the Financial Literacy Charter (included in the attached self-nomination form) and become supporting organisations of the Strategy.

We are reaching out to your organisation to nominate itself to become a supporting organisation and join this network of stakeholders. Supporting organisations are eligible to apply for the [Financial Education Champion \(FEC\)](#), subject to FEC's application criteria. We will also invite supporting organisations to join other work or events related to the Strategy.

We look forward to receiving your support for the Financial Literacy Strategy and the nomination from your organisation. Please revert with the enclosed nomination form. Should you have any question, please don't hesitate to contact my colleague Mr Vincent Poon @ [vincentpoon@ifec.org.hk](mailto:vincentpoon@ifec.org.hk) / 2700 6068.

Best regards

Rex Auyeung  
IFEC board member, Financial Education Coordination Committee Chairperson

Encl. Reply Slip, Financial Literacy Charter

錢家有道  
the Chin family

由投委會管理 Managed by IFEC



香港皇后大道中2號長江集團中心21樓  
21/F Cheung Kong Center, 2 Queen's Road Central, Hong Kong  
☎ +852 2700 6000 📠 +852 2297 3300  
[ifec.org.hk](http://ifec.org.hk) | [thechinfamily.hk](http://thechinfamily.hk)

## Self-nomination Form

(Please email to [flstrategy@ifec.org.hk](mailto:flstrategy@ifec.org.hk))

To the Investor and Financial Education Council:

We are pleased to nominate our organisation to become a Financial Literacy Strategy supporting organisation. We agree with the [Financial Literacy Strategy 2019](#) and sign up to the **Financial Literacy Charter** (Annex 1). We understand that this nomination is subject to IFEC's review and acceptance.

### Organisation

---

### Signatory to Financial Literacy Charter

Name

---

Title

---

### Contact person for Financial Literacy Strategy related matters

Name

---

Title

---

Email

---

Telephone

---

Address

---

## Financial Literacy Charter

People can benefit from improved financial literacy. By increasing their capability to manage money and deal with different socio-economic challenges, it will ultimately assist them to achieve better overall financial well-being. This benefits not only individuals, but also many organisations and society at large.

The work to raise the financial literacy of the Hong Kong population needs to be ongoing and requires sustained efforts of many stakeholders. In becoming a Financial Literacy Strategy Supporting Organisation<sup>#</sup>, an organisation agrees with the [Financial Literacy Strategy 2019](#) and implements the following principles of the Financial Literacy Charter:

1. Encourages informed and responsible money management practices, as outlined in the [Hong Kong Financial Competency Framework](#), that will help improve a person's financial well-being;
2. Raises the awareness of the benefits of financial education among the organisation's service targets / customers, wherever possible;
3. Supports the financial literacy advocacy work towards policy makers and the organisation's respective networks, whenever possible;
4. Provides access to financial education for the organisation's staff;
5. Provides financial education or embeds financial education elements, as an integral part of the organisation's services, wherever applicable; and
6. Refrains from any sales or marketing activities when providing financial education.

<sup>#</sup> The Investor and Financial Education Council reserves the right, at its sole discretion, to reject, suspend or terminate any organisation from being a Financial Literacy Strategy Supporting Organisation.