

Enrollment Form

May & Aug 2024

1 Personal Particulars ▶

*Must complete | # Classroom or Online students must complete

I am a ☐ New Student ☐ Old Student

*(Mr/Mrs/Miss) Surname: _____

*Forename: _____

*Mobile/ Contact No.: _____

FRM Candidate No.: _____

*HKID/ Passport No.: _____

Nationality: _____
(This field must be completed if a passport no. is provided)

*Email: _____

*Year of Birth: _____ (YYYY)

☐ I have reached the age of 18 or above

Company: _____

Position: _____

Postal Address: _____

Delivery Address: _____
Applicable to Online Program only Leave it blank if it is the same as your postal address. Please provide a weekday daytime delivery address and ensure that either yourself or an authorized person will receive the order.

2 Education ▶

Highest Education Achieved# ☐ Bachelor's degree, Major in _____ ☐ Master's degree in _____
☐ Doctoral degree in _____ ☐ Final year of bachelor's degree
☐ Non-degree but have at least a Form 5 education with passes a Maths and English (Syllabus B)

3 Product Selection ▶

		Classroom + Online with Live streaming & Online Catch-up	Schweser Online Resources	Early Bird Price	Full Price
May	Part I Full Package (with Education, Revision Course and Mock Exam & Review)	<input type="checkbox"/> Cantonese by Stephen Wong	SchweserNotes™ with Quicksheet™ (Print & Online) and Schweser Online Mock Exam 1 & 2	On or before 03 Feb 24 <input type="checkbox"/> \$14,400	04 Feb 24 onwards <input type="checkbox"/> \$16,000
	Part I Revision Course	<input type="checkbox"/> Cantonese by Stephen Wong		On or before 06 Apr 24 <input type="checkbox"/> \$6,600	07 Apr 24 onwards <input type="checkbox"/> \$7,200
	Part II Full Package (with Education, Revision Course and Mock Exam & Review)	<input type="checkbox"/> Cantonese by Kenneth Leung	SchweserNotes™ with Quicksheet™ (Print & Online) and Schweser Online Mock Exam 1 & 2	On or before 03 Feb 24 <input type="checkbox"/> \$16,900	04 Feb 24 onwards <input type="checkbox"/> \$18,900
	Part II Revision Course	<input type="checkbox"/> Cantonese by Kenneth Leung		On or before 06 Apr 24 <input type="checkbox"/> \$7,700	07 Apr 24 onwards <input type="checkbox"/> \$8,700
May	Upgrade: Schweser Essential Package⁽¹⁾ (includes SchweserPro™ QBank, InstructorLink & Schweser Commitment and PassProtection™)			Part I \$900 FREE	
				Part II \$900 FREE	

		Online	Schweser Online Resources	Early Bird Price	Full Price
Aug	Part I Online Full Package (with Education, Revision Course and Mock Exam & Review)	<input type="checkbox"/> Cantonese by Stephen Wong	SchweserNotes™ with Quicksheet™ (Print & Online) and Schweser Online Mock Exam 1 & 2	On or before 18 May 24 <input type="checkbox"/> \$14,400	19 May 24 onwards <input type="checkbox"/> \$16,000
	Part I Online Revision Course	<input type="checkbox"/> Cantonese by Stephen Wong		On or before 06 Jul 24 <input type="checkbox"/> \$6,600	07 Jul 24 onwards <input type="checkbox"/> \$7,200
	Part II Online Full Package (with Education, Revision Course and Mock Exam & Review)	<input type="checkbox"/> Cantonese by Kenneth Leung	SchweserNotes™ with Quicksheet™ (Print & Online) and Schweser Online Mock Exam 1 & 2	On or before 18 May 24 <input type="checkbox"/> \$16,900	19 May 24 onwards <input type="checkbox"/> \$18,900
	Part II Online Revision Course	<input type="checkbox"/> Cantonese by Kenneth Leung		On or before 06 Jul 24 <input type="checkbox"/> \$7,700	07 Jul 24 onwards <input type="checkbox"/> \$8,700
Aug	Upgrade: Schweser Essential Package⁽¹⁾ (includes SchweserPro™ QBank, InstructorLink & Schweser Commitment and PassProtection™)			Part I \$900 FREE	
				Part II \$900 FREE	

Schweser Package ▶

Select Your Exam Semester				<input type="checkbox"/> May	<input type="checkbox"/> Aug
Premium Package				<input type="checkbox"/> Part I	\$6,800
Essential Package	+	OnDemand Class	+	<input type="checkbox"/> Part II	\$6,800
Essential Package				<input type="checkbox"/> Part I	\$3,900
Quicksheet (Print & eBook)		SchweserPro™ Qbank	+	<input type="checkbox"/> Part II	\$3,900
Schweser Mock Exams (1-2)		Instructor Link	+		
Others					
Texas Instruments BA-II Plus™ Financial Calculator				<input type="checkbox"/>	\$380

(1) Applicable to Full package only.

Total Payable

4 Method of Payment ▶

☐ Cheque No _____ ☐ Cash ☐ EPS ☐ FPS ☐ PayMe
(payable to "Kaplan Financial (HK) Limited." Cheque should be received by Kaplan Financial 7 working days before course commencement.)☐ Credit Card Installment (Transaction over \$6,000 only. Must enroll in person. Do not send by fax/post)☐ Credit Card (full payment) ☐ VISA ☐ AMEX ☐ MasterCard

For Email, Fax and Post Order Only

Card Number _____ - _____ - _____ - _____ Expiry Date ____/____

Card Holder _____ Signature _____

Declarations

- I declare that all information provided in this form and all attached documents are, to the best of my knowledge, accurate and complete.
- I have understood and hereby agree to provide relevant proof of my academic qualifications and work experience upon request from Kaplan Financial at any time.
- I consent that I will abide by all the Rules, Regulations, and Code of Conduct of your company.
- I have read, understood and hereby agree to the terms and conditions stipulated on the brochure, enrollment form and on Kaplan Financial's website.
- I have met the system requirements of the eLearning platform and the testing result is satisfactory.
- I wish to receive Kaplan Information by email in the future.

Signature _____

Date _____



Important

In order to ensure your enrollment/order is processed, you are asked to ensure that you (1) read the details on the brochure and enrollment form, (2) provide all the information required and (3) submit all the necessary document required in support of your enrollment/ order. We strongly advise you to submit your enrollment/order form as early as possible. This will enable us to process it more quickly. Please note that there is a limit to the number of students who can be accepted in our classes. Seats/products will not be reserved for incomplete enrollment/order package returned to Kaplan. Kaplan requires students to conduct themselves in accordance with the standards of their future professions. You can find students' responsibilities information at <https://www.kaplan.com.hk/code-of-conduct>.

Payment Methods

- 1) VISA/ Master / Amex Card
Payment can be made in person, by fax, email or by mail (see address at the bottom) or via online store.
Interest-free installment: For transaction over \$6,000. Payment has to be made in person. Cardholders of HSBC/SC VISA / Mastercard and selected Amex Cards can enjoy a 3/6-month (HSBC/SC) or 12-month (Amex) interest-free installment for course fees of \$6,000 or above in single payment. The cardholder has to be the student himself/herself. Amex Cardholders, please call us first at +852 2526 3686 to check your credit card eligibility.
- 2) Cash / EPS
Fees can be paid by cash or EPS at our E-Tech Centre Campus.
- 3) Cheque
Fees can be paid by crossed cheque made payable to "Kaplan Financial (HK) Limited". Please mail the cheque and all required documents to us. Kaplan will not be responsible for any loss of payment sent by mail. If you are enrolling a course that will commence in less than 7 working days, you are advised against using cheque in view of delay arising from postage delay and bank clearance.
- 4) FPS / PayMe
Fees can be paid by FPS or PayMe at our E-Tech Centre Campus or via our online store (<https://store.kaplan.com.hk/>).

Classroom Program

We will acknowledge your successful enrollment by providing you an official receipt within 3 working days after your submission. If we require more information/documentary evidence from you, or we are unable to accept you onto your chosen class, we will contact you by phone or email. If you do not hear from us, please check with us at +852 2526 3686 or email to hkfrm@kaplan.com.

Course details (including confirmed dates and teaching venue) will be emailed to you 3 working days prior to course commencement. If you do not hear from us, please check with us at +852 2526 3686 or email to hkfrm@kaplan.com

Online Program

To ensure your satisfactory viewing result, a system validation procedure is required before your enrollment is processed. Please view the demo link for at least 10 mins **on your computer which you will access Online program** (<https://bit.ly/3covGGDs>) and ensure your testing result is satisfactory. We will acknowledge your enrollment within 7 working days by (1) providing you the official receipt, (2) emailing you the login information. If you do not hear from us, please check with us at +852 2526 3686 or email to hkfrm@kaplan.com.

Course materials will be released in milestones. You are required to collect the course material including course slide pack and Schweser Essential Package (only if you have enrolled) in person or you are welcome to arrange your own courier services. Kaplan offers delivery service at additional cost to a Hong Kong local address (preferably business address). You are responsible for assuring there is an authorized personnel to receive the materials at time of delivery. Kaplan will not re-ship course materials that are returned to us. Please check the box under "Shipping Request" and fill in your delivery address (if it is different from your postal address) on the enrollment form. Kaplan will deliver to most countries, orders that are shipped to countries outside of Hong Kong may be subject to import taxes, customs duties and fees levied by the destination country. Recipient of an international shipment may be subject to such fees, which are levied once a shipment reaches the destination country. Additional charges for customs clearance must be borne by the recipient. Kaplan has no control over these charges and cannot predict what they may be. When customs clearance procedures are required, it can cause delays beyond our original delivery estimates. Kaplan will not issue you a refund under such circumstances. Please call us at +852 2526 3686 or email to hkfrm@kaplan.com for details.

Availability: The shipping time is around 2-4 business days. Business days are Monday through Friday.

Notes to Visa Holder Applicants

Holders of valid working visas or dependency visas are welcomed to consult Kaplan for admissions to live classes. If the existing visa does not indicate your eligibility for staying and / or studying in Hong Kong, please further consult the Immigration Department of the HKSAR Government. (website: <http://www.immd.gov.hk>; telephone: (852) 2824 6111). The Immigration Department is fully empowered for the processing of visa application and the approval for the applicants' eligibility for staying and /or studying in Hong Kong. Kaplan's acceptance of your application for the live class does not warrant for successful visa approval from the Immigration Office. Visa holder applicants and students should be careful of their full compliance with the relevant immigration laws and ordinances during their staying and studying in Hong Kong.

Personal Data Protection

- 1) Your personal data is collected and used by us for processing your application of admission, and for registration, administrative, verification, research, statistical and direct marketing purpose. We may also collect personal information to satisfy legal, government and statutory obligations. Provision of personal data is necessary, and without your personal data, we may not be able to provide your with services you require. We may share and transfer your personal data with other members of the Kaplan group and/or authorized third parties providing services to us in relation to the above purposes and/or other prescribed purposes as allowed by law from time to time. In all such circumstances, data will be treated in strict confidence.
- 2) Under the provisions of the Personal Data (Privacy) Ordinance, applicants have rights to request access to, and to request correction of, his or her personal data. Applicants wishing to amend his or her data should fill out the prescribed form and submit it to Kaplan. Applicants may opt-out from receiving our direct marketing materials at any time.
- 3) If you do not wish to receive our offers and updates, please email us at hkmarketing.kf@kaplan.com to unsubscribe or tick the below box(es).
 - ☐ Unsubscribe from all Kaplan Financial emails
 - ☐ Unsubscribe from non-Financial Markets mailing list only
- 4) This clause has been translated into Chinese. If there is any inconsistency or ambiguity between the English version and the Chinese version, the English version shall prevail.

FOR OFFICIAL USE ONLY:

F-SO: _____ ST2000: _____ PY: _____ HK\$: _____ App#: _____ Date: _____ Handler: _____

Kaplan Financial (HK) Limited

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Email: hkfrm@kaplan.com

www.kaplan.com.hk/financial-markets

E-Tech Centre Campus

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(Causeway Bay MTR Exit A)

Opening Hours

Mon-Fri 11:00am – 8:00pm

Sat 9:00am – 6:00pm

(Closed on Sun & Public Holidays)