



IARFP

International Association of Registered Financial Planners

Enquiry No
Previous Stu No
AIRFP No
IRFP No
FIRFP No

照片 (PHOTOS)

INTERNATIONAL ASSOCIATION OF REGISTERED FINANCIAL PLANNERS

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E-mail: info@iarfp.org.uk Website: www.iarfp.org.uk

Registered No 6518316 (England) Limited by Guarantee

APPLICATION FOR FULL STATUS

(PLEASE USE BLOCK CAPITALS)

Surname or family name 姓氏

Other names 名字

Mr Mrs Miss Ms

Other (please state)

Home address 住宅地址

Work address 工作地址

Postcode

Postcode

Home telephone 住宅電話

Work telephone 工作電話

E-mail address 電郵地址

通訊地址 Address for correspondence Home 住宅 公司 Work 出生日期 日 月 年 年齡

身份证号码: 最高学历:

专业资格: (如有, 请附上资格证书复印件)

Nationality 國籍

Nature of business 行业

Job title 职位

Date of commencement 入職日期

REMITTANCE MAY BE MADE IN STERLING BY CHEQUE, OR BY VISA/ ACCESS OR MA (不需填)

Annual subscription

Card number

Administration fee

Cardholders name

Other

Signature

Total enclosed £

Expiry date

Total to charge £

FOR OFFICE USE ONLY			Date received			
Notified	Cert	BK/Diary	Comm. date	Grade	Initials	Route

Batch ref

Details of Higher & Further Education examinations passed, including IARFP* (必填)

學歷及專業考試

Date 年份	University 大学	Professional 专业	Grade 成績

*Where exams taken are other than those of the IARFP, qualifications must be supported by documentary evidence (eg relevant certificates - if submitting photocopies, they must be certified by an appropriate person).

請提供所有高等學歷的證明

工作經驗 - 從現在的僱主開始 (必填)

Employment History - commence with present employer

Year 年份	Name & address of employer 公司名稱及地址	Position held 職位	Annual salary 年薪

Please attach a current job description confirming the date of commencement.

請提供公司證明信 (必須列明入職日期、工作職位及工作範圍等)

If self employed, please attach a copy of your letterhead and state how long you have been self employed.

如自僱人士，請提供公司信紙，並列明公司開業日期

Referees -please insert names and addresses of two persons from whom references may be obtained in support of this application who are able to vouch for your personal character and competence in accountancy (bank references are not acceptable)

諮詢人

Name

Address

Postcode

Occupation

Name

Address

Postcode

Occupation

I wish to apply for admission to the International Association of Registered Financial Planners as Associate /Fellow* *delete as appropriate

1 I have passed the examinations of the Association

Registered student number

2 I wish to claim exemptions from the Association's examinations on the basis of the examinations passed and listed opposite

3 I wish to complete the Accreditation of Prior Learning Portfolio and enclose the Experience checklist*

*U K only

I undertake, if admitted, to observe the provisions of the Memorandum and Articles of Association, Bye-Laws and Regulatory System for the time being in force. I certify that the statements in support of my application are, to the best of my knowledge, true and complete. I declare that I have not been debarred from membership of any professional body.

DATA PROTECTION ACT 1998: All personal information on this form is held in accordance with the provisions of the Act and may be passed to third parties for the promotion of goods and services. All rights, duties and responsibilities under the Act are acknowledged.

If you do not wish to receive information sent by third parties from time to time, please tick

If you give your permission for your personal details to be divulged at the request of a bank manager or prespective employer, please tick

Signature

Date

Please PRINT YOUR NAME as you wish it to appear on the membership certificate if your application is successful.

EQUAL OPPORTUNITIES

The Association is committed to providing equal opportunities to all candidates. To check that we are achieving this aim we monitor the personal circumstances of applicants and to assist us we ask you to provide the following information about yourself.

Please tick relevant box

1 Gender

性別

Male

Female

2 You worked for many years? 5年以下

5-10年

11-15年

15年以上

你工作了多少年？

3 What do you engage in the industry?

你从事什么行业？

4 Are you self employed?

你是否自僱？

Yes

No

5 Do you want to continue reading AFA?

你是否希望继续申读英国财务会计师（AFA）？

Yes

No

6 Do you want to continue reading the ?

financial Master Shen (Financial Planner direction)?

你是否希望继续申读金融硕士（财务策划师方向）？

Yes

No

Please tick against the list below the description that best fits your ethnic origin:

Asian - British

Asian - other

Bangladeshi

Black - African

Black - British

Black - Caribbean

Black - other

Chinese

Indian

Pakistani

White - British

White - other European

White - other

Any other

Thank you for your co-operation in completing these questions.