

**Membership Application Form for
The Association of Fund Administrators of Hong Kong and the Greater Bay Area**
(hereinafter referred to as “afa”)

Kindly complete this form and return a signed copy to the e-mail address at gm@afahkgba.org

1. COMPANY DETAILS

Company name:			
Trading name (If different from registered company name):			
Address:			
		Country/Region:	
Tel. no:		Fax. no:	
Website:			

2. CONTACT DETAILS

Main contact name:	
Job title:	
Contact telephone no:	
E-mail address:	

Representative Name	Job Title	Email Address	Phone number

3. MEMBERSHIP TYPE and FEES

Membership Type		Membership Fee (for new member)		Annual Fee (membership renewal)
<input type="checkbox"/>	Corporate Member	<input type="checkbox"/>	HK\$5,000 (joining on or before 30 June)	HK\$5,000
		<input type="checkbox"/>	HK\$2,500 (joining on or after 01 July)	
<input type="checkbox"/>	Corporate Associate Member	<input type="checkbox"/>	HK\$2,500 (joining on or before 30 June)	HK\$2,500
		<input type="checkbox"/>	HK\$1,250 (joining on or after 01 July)	
<input type="checkbox"/>	Friends of “afa” / Others	<input type="checkbox"/>	Fee according to activities enrolled	

4. SOURCE OF INFORMATION

<input type="checkbox"/>	Referral (e.g. you know any of the Executive Committee members or other “afa” members)
<input type="checkbox"/>	Media or Social Media (e.g. LinkedIn, ...)
<input type="checkbox"/>	Events (e.g. via Conference, Forum, Meetings, Seminars, Webinars organized by “afa”)
<input type="checkbox"/>	Internet (e.g. “afa” official website or other search engine)
<input type="checkbox"/>	Others (e.g. via Fund Admin courses organized by “afa”)



5. MEMBERS OF OTHER PROFESSIONAL BODIES

Please indicate if you are also a member of other professional bodies:

a)
b)
c)

6. UNDERTAKING AND CONFIRMATIONS

- a) I/We hereby confirm that I/we will not utilize information (“**afa Information**”) provided by the “afa”, including without limitation the “afa” membership list, for any marketing or promotional purposes for myself/the Company and further undertake to ensure that myself/ the Company will not use the “afa” Information for any marketing or promotional purposes.
- b) Furthermore, I/we undertake that neither I/we will exploit or make reference to the Company’s membership of “afa” or any position (including, inter alia, membership of any “afa” Committee or membership of “afa”) that I/we may hold, in the future, without the prior permission of “afa” or of an appropriate, authorized representative of “afa”.
- c) I/We confirm we agree that, in the event of the cancellation of membership, any claim for a refund of Membership Fees paid will be entirely subject to the discretion of “afa”.

7. PAYMENT OPTIONS AND INFORMATION

- a) Your application will be processed, and, upon approval, an invoice will be issued. Membership will only become active once full payment of the Membership Fee is received. You may pay by cheque or bank transfer (details on invoice).
- b) Membership Fee is payable upon joining and will be pro-rated on a half-year basis if you join on or after 1 July of each year.
- c) Annual Membership Fee is payable and members will be invoiced annually for the renewal of membership.

8. USE OF PERSONAL DATA

- a) I/We agree to the details of the Company and/or contact named above being listed on “afa”’s online members’ directory as the contact point of “afa”’s membership, and I/ we confirm that the provision of the details of the Contact in this form is in compliance with the PDPO.
- b) I/We have carefully read and understood the personal information collection statement (“PICS”) at Appendix 1 hereto and I/we agree to the terms thereunder.
- c) I / We acknowledge that “afa” may only use the Personal Data (as defined in the PICS) with my/our consent (which includes an indication of no objection).

I/we do not wish that my/our Personal Data be used by “afa” for direct marketing of services as described in the PICS.*

* Please note that the requirement to obtain your consent and the right to make a request to cease the use of your Personal Data for direct marketing is not applicable to you if the direct marketing is addressed to you solely in your capacity as a representative of a company or business and is not sent to you in your individual or personal capacity.



9. SIGNATURE

I/We hereby represent that I/we am/are authorized to sign for and on behalf of the Company for the application of “afa” membership.

Authorized Signature (s)

Name

Position

Date

Please note that “afa” reserves the right to decline a membership application and is not obliged to provide any rationale for that decision. In such an event, “afa” will keep that decision entirely confidential and reserves the right to request references, as may be appropriate.

Please submit your signed and completed form via email to gm@afahkgba.org

Thank you for your application

Appendix 1

Personal Information Collection Statement (“PICS”)

Please carefully read this PICS which provides you with information regarding the personal data policy of “afa”. Please refer to Appendix 2 for “afa”’s privacy policy statement.

1. Collection and Use of Personal Data

“afa” may from time to time collect from you or through other sources the personal data (as defined within the meaning of the PDPO) relating to individuals of your Company (“**Personal Data**”). The Personal Data includes without limitation name, gender, employer name, contact information including telephone number, fax number, email address and mailing address, job title, academic and professional qualifications.

“afa” may use Personal Data for one or more of the following purposes:

- reviewing membership application;
- admission to any accreditation program or training courses organized / sponsored by “afa”;
- maintenance of members’ register;
- communication in respect of matters concerning membership or “afa”;
- conducting market research surveys

2. Use of Personal Data for Direct Marketing

“afa” intends to use Personal Data in direct marketing in the manner as described below and we require your consent (which includes an indication of no objection)* for that purpose.

The following Personal Data may be used for direct marketing: name, gender, employer name, contact information including telephone number, fax number, email address and mailing address, job title.

Personal Data may be used for direct marketing of one or more of the following services offered by “afa”: events or activities, including training, educational events, seminars, forums, and any other services directly related to the above.

If you do not wish us to use your Personal Data for use in direct marketing as described above, you may exercise your opt-out right.

Your Personal Data will not be disclosed and/or transferred by us to any third party outside of “afa” for direct marketing.

If you do not wish us to use your Personal Data for direct marketing, please let us know by writing to our Data Protection Officer at the address at gm@afahkgba.org.

* Please note that the requirement to obtain your consent and the right to make a request to cease the use of your Personal Data for direct marketing is not applicable to you if the direct marketing is addressed to you solely in your capacity as a representative of a company or business and is not sent to you in your individual or personal capacity.

3. To Whom Personal Data May Be Provided

For the purposes set out in section 1 above, “afa” may, in the course of operating “afa” or to the extent necessary, provide Personal Data to the following parties, who may be based within or outside Hong Kong:

- Authorized personnel of “afa”;
- any agent, contractor or third-party service provider who offers administrative, telecommunications, computer, payment or other services to “afa” in connection with the operation of “afa”;
- any other person provided that such person is under a duty of confidentiality to the “afa” which has undertaken to keep such information confidential;
- any legal or tax adviser, accountant, other financial or professional adviser to “afa”;
- any government, regulatory body or other person to whom Personal Data is required to be disclosed in accordance with the requirements of any applicable laws binding on / applicable to the “afa”, or an order of a court of any competent jurisdiction.



4. What Rights Do You Have?

In accordance with the PDPO you may:

- (i) check whether “afa” holds Personal Data about you and gain access to such data;
- (ii) require “afa” to correct any Personal Data relating to you which is inaccurate;
- (iii) ascertain “afa”’s policies and practices in relation to Personal Data and be informed of the kind of Personal Data held by “afa”.

In accordance with the PDPO, “afa” has the right to charge a reasonable fee for the processing of any Personal Data access request. All requests for access to Personal Data or correction of Personal Data or for information regarding policies and practices and kinds of Personal Data held should be addressed as follows:

Data Protection Officer

E-mail: gm@afahkgba.org

Appendix 2

PRIVACY POLICY STATEMENT (“PPS”)

In the course of conducting its business, “afa” may collect personal data. In handling such personal data, it is our policy to observe at all times both the letter and spirit of the Personal Data (Privacy) Ordinance (Cap 486 of the Laws of Hong Kong) (the “**PDPO**”) in collecting, maintaining and using such personal data. In particular, we shall observe the following principles, save otherwise agreed by the data subject:

- collection of personal data from data subjects must be for purposes relating to the conduct of our business including the provision of our services;
- all practical steps must be taken to ensure that personal data is accurate and shall not be kept longer than necessary;
- personal data shall not be used for any purposes other than for which the data were to be used at the time of collection or purposes directly related thereto;
- personal data shall be protected against unauthorized or accidental access, processing or erasure, loss or use;
- data subjects shall have the right of access to and for correction of their personal data held by us and data subjects’ requests for access or correction shall be dealt with in accordance with the **PDPO**.

Personal data will only be disclosed by us in the manner as set out in the personal information collection statement (“**PICS**”) for the relevant data subject or with the data subject’s express consent, or where permitted or required by the **PDPO** or otherwise are required to be disclosed in accordance with applicable legal and/or regulatory requirements.

Neither “afa” nor any of its authorized persons shall in any way transfer the data subjects’ personal data to any other party for gain.