

合辦：

贊助機構：

撥款及監察機構：



Personal Finance Ambassador Programme 2024

個人理財大使計劃 2024

Programme Background 計劃背景

The Personal Finance Ambassador Programme 2024 is sponsored by HKEX Foundation through The Community Chest of Hong Kong and co-organised by Investor and Financial Education Council and St. James' Settlement. Students are required to form a team to participate in the programme and are trained as Personal Finance Ambassadors through a Training Camp and project meetings. Each team will develop and implement a financial education project on a specified theme. The project will promote financial education messages to tertiary students. All Ambassadors will attend the Presentation and Award Ceremony. Six shortlisted teams will present their projects in competition and compete for the Excellent Financial Education Project Awards. All awarded team will present their excellent financial education project to the public in the project showcase.

個人理財大使計劃 2024 由香港交易所慈善基金透過香港公益金撥款贊助，並由投委會及聖雅各福群會合辦。參加者需以隊伍形式報名，參與訓練營及工作會議獲培訓成「個人理財大使」。每隊將會設計及推行一項理財教育計劃，向大專同學推廣理財教育訊息，以提升他們對個人理財的認識。完成計劃後，大使們將出席匯報會及嘉許禮。當中入圍的六隊將匯報其計劃成果，並競逐各個優秀理財教育計劃獎項。所有獲獎隊伍將參與計劃成品展向公眾展示及推廣理財教育的信息。

Period 活動日期

Oct 2023 – Feb 2024

2023 年 10 月至 2024 年 2 月

Target 對象

- ◆ Three to five students from the same tertiary institution per team
三至五名同一院校的大專學生組成一隊
- ◆ Any disciplines (a cross-discipline team is encouraged)
歡迎任何學科(跨學科的同學組隊更佳)

Financial Education Project Guidelines 理財教育計劃指引

- ◆ Theme: Sustainable Personal Finance
活動主題: 可持續理財生活

- ◆ Each team is required to submit ONE financial education project proposal
每隊只可遞交一份理財教育計劃書
- ◆ Each team is required to execute the financial education project within the period from 30 Oct 2023 to 1 Dec 2023 and submit the report and all expense receipts on or before 10 Dec 2023.
各隊伍必需於 2023 年 10 月 30 日至 12 月 1 日期間內完成理財教育計劃，並於 2023 年 12 月 10 日或之前，提交報告及開支單據
- ◆ The financial education project should be implemented in your own tertiary institution and targeted at tertiary students
理財教育計劃需在所屬大專院校內舉行及以大專學生為對象
- ◆ Be creative. There is no limitation on the format (e.g. Website, YouTube video, Facebook page, Instagram channel, social media challenge activity, online game, blog, booth, sports, 3D photo-taking, mobile app design, board game, micro-film, exhibition, singing, drama or any other performance show, etc.)
具創意及形式不設限制（例如：網站、YouTube 短片、臉書專頁、Instagram 頻道、社交媒體挑戰活動、網絡遊戲、網誌、攤位、運動、3D 攝影、流動程式設計、桌上遊戲、微電影、展覽、歌唱、戲劇等等）
- ◆ Each team will be given a maximum budget of HK\$5,000 to implement the project. All expenses should be pre-paid by the team and the receipts will be examined. The amount will be reimbursed within three weeks after the report submission
每隊所有開支成本均為實報實銷，最高可獲資助額為港幣 5,000 元。所有開支由隊伍先行墊支費用，開支單據經核實後，會在報告遞交後三星期內發還
- ◆ All cost reimbursement must be approved by the organisers
所有實報實銷的開支成本必需先由主辦單位批准
- ◆ Organisers reserve the right to cancel the funding in case of any changes to the project without prior agreement with the organisers
未經主辦方事先同意，如計劃發生變更，主辦方保留取消資助的權利
- ◆ Participating teams are required to attend all activities, meetings and complete their financial education project
參賽隊伍必須參與所有活動、會議及完成理財教育計劃
- ◆ The WHOLE team is required to attend the interview in pitching format. Each team will be given 5 minutes to present your ideas and follow-up questions will be asked by the organisers
必須整個隊伍出席面試並以提案形式介紹其想法。每隊隊伍須預備 5 分鐘的提案，而主辦單位將就每隊的提案提出跟進問題
- ◆ Team leader will be the main contact persons with the organisers
隊長將代表整個隊伍與主辦單位聯繫

Awards 獎項

- ◆ All Ambassadors who successfully complete the programme will be awarded "Personal Finance Ambassador Certificate".

所有完成計劃的大使，將獲頒發「個人理財大使證書」

- ◆ Six teams will be shortlisted to present their financial education projects to a panel of judge at the Presentation and Award Ceremony to compete for the following awards:

六支入圍隊伍將會向評判團匯報其理財教育計劃，並在匯報會及嘉許禮上競逐以下優秀理財教育計劃獎項：

Excellent Financial Education Project - Gold Award (1 team) HK\$20,000 & Trophy

優秀理財教育計劃獎 - 金獎（一隊）港幣 20,000 元及獎盃

Excellent Financial Education Project - Silver Award (1 team) HK\$10,000 & Trophy

優秀理財教育計劃獎 - 銀獎（一隊）港幣 10,000 元及獎盃

Excellent Financial Education Project - Bronze Award (4 teams) HK\$5,000 & Trophy

優秀理財教育計劃獎 - 銅獎（四隊）港幣 5,000 元及獎盃

- ◆ For other non-shortlisted teams, judges will select one team for Judges' Award to recognise their talent and efforts on certain aspects of the financial education project.

其餘未入圍的隊伍，評判將選出一隊獲取評審嘉許獎，以表揚該隊理財教育計劃在特定範疇的成果及努力

Judges' Award (1 team) HK\$1,000 & Trophy

評審嘉許獎（一隊）港幣 1,000 元及獎盃

Timeline 活動日程

Date 日期	Activities 活動
18 Sep 2023 (19:00 – 19:30)	Online briefing session (optional) 線上簡介會 (選擇性出席)
5 Oct 2023	Enrolment and financial education project proposal submission deadline 申請表及理財教育計劃書截止遞交日期
29 Sep – 11 Oct 2023	Team Pitching Interview 提案面試輪選
12 Oct 2023	Confirmation sent to all successful teams 被取錄確認通知
18 Oct 2023	Pre-Camp Briefing Session 營前簡介會 Time 時間: 18:30 – 20:30
21-22 Oct 2023 (Sat and Sun)	Training Camp 訓練營 Time 時間: 10:00 – 16:00
23-28 Oct 2023	1 st Financial education project consultation session 計劃前理財教育計劃諮詢環節
30 Oct - 1 Dec 2023	Meetings and implementation of financial education projects 會議及落實理財教育計劃
11-17 Nov 2023	2 nd Financial education project consultation session 計劃中期理財教育計劃諮詢環節
10 Dec 2023	Submission of report and expense receipts 提交報告及開支單據
16 Dec 2023	Storytelling for Presentation and Reflection 演說技巧訓練與經驗整理 Time 時間 : 10:00 – 18:00
27 Dec 2023	Company visit 企業或公司參觀
28 Dec 2023	6 shortlisted teams announcement 六支隊伍入圍結果通知
13 Jan 2024 (Sat)	Presentation and Award Ceremony 匯報會及嘉許禮 Time 時間 : 10:00 – 15:00
Jan – Feb 2024	Project Showcase 計劃成品展 六支入圍隊伍將會參與公眾成品展, 將其理財教育計劃之內容向公眾人士展出及推廣

Enrolment method and deadline 報名方法及截止日期

Please email the enrolment form attached with the financial education project proposal on or before 5 October 2023 to will.kwok@sjs.org.hk

請填寫一份申請表及理財教育計劃書, 於截止日期 2023 年 10 月 5 日或之前, 以電郵遞交至 will.kwok@sjs.org.hk

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NOTES:	備註：
<p>Please fill in the form and complete all items consistently in either Chinese or English.</p> <p>Please contact Career Sparkle of St. James' Settlement if you wish to amend personal data after submitting this application.</p> <p>Information of unsuccessful candidates, if not needed, will be destroyed after the recruitment exercise.</p> <p>Please send the completed forms to will.kwok@sjs.org.hk</p> <p>Submission Deadline: <u>05/10/2023</u></p> <p>For any enquiries, please contact Will Kwok at <u>2596 2779</u></p>	<p>請劃一以中文或英文填寫此申請表</p> <p>遞交申請表格後，如欲更改填報資料，請以書面通知聖雅各福群會生涯規劃服務</p> <p>甄選程序完成後，未獲取錄申請人的資料若毋須保留，將全部銷毀</p> <p>請將填妥的表格電郵至 will.kwok@sjs.org.hk</p> <p>截止提交日期：<u>2023年10月05日</u></p> <p>如有任何查詢請致電 <u>2596 2779</u> 與郭先生聯絡</p>

PART A : Enrolment Form 申請表

I. Personal Particulars 個人資料

Team Name 隊伍名稱	Name of Institution 就讀院校
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(1) Team Leader 隊長

Surname 姓氏	First Name 名字	Name in Chinese 中文姓名	Gender 性別
Programme Study 就讀學科		Year of Study 就讀年級	
Student No. 學生編號		Mobile No. 手提電話號碼	
Email Address *將透過此登記電郵通知有關申請事宜 電郵地址			

(2) Team member 組員

Surname 姓氏	First Name 名字	Name in Chinese 中文姓名	Gender 性別
Programme Study 就讀學科		Year of Study 就讀年級	
Student No. 學生編號		Mobile No. 手提電話號碼	
Email Address *將透過此登記電郵通知有關申請事宜 電郵地址			

(3) Team member 組員

Surname 姓氏	First Name 名字	Name in Chinese 中文姓名	Gender 性別
Programme Study 就讀學科		Year of Study 就讀年級	
Student No. 學生編號		Mobile No. 手提電話號碼	
Email Address *將透過此登記電郵通知有關申請事宜 電郵地址			

(4) Team member 組員

Surname 姓氏	First Name 名字	Name in Chinese 中文姓名	Gender 性別
Programme Study 就讀學科		Year of Study 就讀年級	
Student No. 學生編號		Mobile No. 手提電話號碼	
Email Address *將透過此登記電郵通知有關申請事宜 電郵地址			

(5) Team member 組員

Surname 姓氏	First Name 名字	Name in Chinese 中文姓名	Gender 性別
Programme Study 就讀學科		Year of Study 就讀年級	
Student No. 學生編號		Mobile No. 手提電話號碼	
Email Address *將透過此登記電郵通知有關申請事宜 電郵地址			

Declaration 聲明

1. I understand that if I give any false information or withhold any material information, I shall render myself liable to dismissal if I am selected to participate in this programme.

本人明白倘若虛報資料或隱瞞重要事實，即使已獲准參與此計劃，亦有被取消參與計劃的可能。

2. I understand that I have to attend ALL activities and finish the programme if I am admitted to the programme, otherwise, I may be disqualified from taking part in the programme.

本人明白接納取錄後，必須出席計劃內的全部活動並完成計劃，否則將有可能被取消參加資格。

3. I understand that I will not be granted an ambassador certificate if I withdraw from the programme at any stage for personal reasons or being disqualified.

本人明白，如在計劃期間因個人原因申請退出或被取消參加資格，均不會獲發大使證書。

4. I, do hereby consent and agree that Organisers have the right to take photographs, videotape, or digital recordings of me during the programme and to use these on any communications channel including but not limited to publication release, website and social media platform.

本人同意主辦單位對我進行拍攝或錄音，無論事先、事後告知，主辦單位均可通過各種媒介（包括並不限於書籍、新聞稿、網站、社交媒體等）展示有關照片、影片及錄音。

5. In compliance with the requirements of the Personal Data (Privacy) Ordinance to ensure that personal data collected are properly stored, the personal information will be used for programme selection and other related purposes.

根據《個人資料(私隱)條例》所列載的規定，個人資料將依照收集資料時所說明之目的使用，並確保得到妥善儲存。閣下提供予本會的個人資料將用作甄選計劃及計劃有關事宜之用。

6. Your personal data (name, telephone number, fax number, email and mailing addresses) will be used for the purpose of application, contact, survey, results announcement and any arrangement related to this activity/ scheme. For the above purpose, your name and school name/ organisation name may be disclosed through St. James' Settlement's website and/ or other websites and/ or media. Your information may also be provided and disclosed to St. James' Settlement's co-organisers/ supporting organisations/ media. In addition, we will collect your social media contact for communication and feed-sharing purposes. However, your personal data cannot be used unless your consent is obtained. Upon your request at any time and at no charge, we will cease to use your personal data for promotion purposes.

閣下的個人資料(包括姓名、電話、傳真、電郵及郵寄地址等)將用於是次活動/計劃報名、聯絡、意見調查、賽果公佈及安排活動/計劃一切事宜之用。為上述目的，閣下的姓名及所屬學校/機構名稱或會在聖雅各福群會的網站及/或透過其他網站及/或媒體披露。聖雅各福群會亦可能提供或披露閣下的資料予聖雅各福群會的合辦機構、支持機構或傳媒。另外，是次計劃會收集閣下的網上社交媒體資訊，以作通訊及分享貼文

用途。除非已取得你的同意，否則你的個人資料將不會用作上述用途。閣下可以隨時向本會提出要求停止使用閣下的個人資料，此項安排毋須繳付任何費用。

I have read, understand and agree to the proposed use of my personal data as stated above.
本人已閱讀、了解及同意上述有關使用個人資料的安排。

如閣下不同意上述安排，請在簽署前於以下空格加上「×」號。

I do not agree to the proposed use of my personal data as stated above.
本人不同意上述有關使用個人資料的安排。

Signature 簽署： _____ (Team Leader 隊長)

_____ (Team member 組員)

_____ (Team member 組員)

_____ (Team member 組員)

_____ (Team member 組員)

Date 日期： _____

PART B : Financial Education Project Proposal 理財教育計劃書

Team Name 隊伍名稱	Name of Institution 就讀院校
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Project Title 計劃名稱

Objectives 目標

Details 內容

Project Timeline 計劃日程

Date & Time 日期及時間	Programme Content 活動內容	Venue 地點

