

# 個人理財大使計劃2020/21



## 目的

計劃由香港交易所慈善基金、投委會及聖雅各福群會合辦，參加者將接受培訓成為「個人理財大使」，提高對個人理財的認識。今年主題是「Keep好你身財」以保持健康個人理財，大使們落實理財教育計劃並向同學進行網上推廣，以提升他們對健康理財的認識。入選隊伍將獲批最高港幣4,700元資助額實行計劃。請從速報名參加，與其他院校隊伍交流學習，落實你的活動大計！

## 對象

現就讀本地大專或大學的同學

## 獎項

參加者將獲頒「個人理財大使」證書，表現最好的六個入圍隊伍將被邀請在嘉許禮中匯報計劃成果。

### 優秀理財教育計劃

金獎得獎隊伍(一隊)獲得港幣20,000元

銀獎得獎隊伍(一隊)獲得港幣10,000元

銅獎得獎隊伍(四隊)各獲得港幣5,000元

評審嘉許獎隊伍(一隊)獲得港幣1,000元

## 合辦



## 計劃內容

4-6人組隊參加，遞交申請表及計劃書

參與網上訓練  
培訓成為「個人理財大使」

在學校落實計劃  
宣傳「Keep好你身財」資訊

提交計劃報告競逐獎項

參與嘉許禮接受「個人理財大使」  
證書，表現出色的7個計劃將獲頒獎項

計劃詳情及下載申請表請瀏覽以下網址：  
<https://careersparkle.sjs.org.hk>

## 截止報名日期

2020年10月9日

## 查詢及報名

電話：2596 2731

電郵：serena.wong@sjs.org.hk

聯絡人：黃小姐





## Personal Finance Ambassador Programme 2020/21 個人理財大使計劃 2020/21

### Programme Background 計劃背景

The Personal Finance Ambassador Programme 2020/21 is co-organised by HKEX Foundation, Investor and Financial Education Council, and St. James' Settlement. Students are required to form a team to participate in the programme and be trained as Personal Finance Ambassadors at a **VIRTUAL Day Camp**. Each team will develop and implement a financial education project on a specified theme. The project will promote financial education messages to students at your own institutions. All Ambassadors will attend the Presentation and Award Ceremony (Physical or virtual event depending on the situation of COVID-19). Six shortlisted teams will present their projects in a competition and compete for the Excellent Financial Education Project Awards. If there's no COVID-19 outbreak, all Ambassadors will then enjoy a luncheon after the presentation, and receive the Certificates.

個人理財大使計劃 2020/21 由香港交易所慈善基金、投委會及聖雅各福群會主辦。參加者需以隊伍形式報名，在網上訓練日營中培訓成為「個人理財大使」。每隊將會設計及推行一項理財教育計劃，在其院校內向同學進行推廣理財教育訊息，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（視乎疫情發展而安排實體或網絡典禮）。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。如沒疫情，所有大使將在匯報會後參與午宴，並獲頒證書。

### Period 活動日期

Oct 2020 – Jan 2021

2020 年 10 月至 2021 年 1 月

### Target 對象

- ◆ Four to six students from the same tertiary institution per team  
四至六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: Keep Financially Fit  
活動主題：Keep 好你身「財」
- ◆ 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 9 Nov 2020 to 11 Dec 2020, and submit the report and all expense receipts within 10 days after the completion of the project  
各隊伍必需於 2020 年 11 月 9 日至 12 月 11 日期間內完成理財教育計劃，並於完成後的 10 天內，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 are 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\$4,700 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 4,700 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 without prior agreement  
如未獲主辦單位同意下進行更改，主辦單位保留撤銷資助的權利
- ◆ Successful teams are required to attend all activities, meetings and complete their financial education project  
被取錄的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 to introduce your project  
必須整個隊伍出席面試並介紹其想法
- ◆ Team leader and vice team leader will be the main contact persons with the organisers  
隊長及副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，評判將選出其中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
9 Oct 2020 12:00noon	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
13 - 20 Oct 2020	Team interview 面試輪選
22 - 23 Oct 2020	Confirmation sent to all successful teams 被取錄確認通知
<b>31 Oct 2020 (Sat)</b>	<b>VIRTUAL Day Camp 網上訓練日營 (Zoom webinar)</b> <b>Time 時間：2:00pm - 6:00pm</b>
6 Nov 2020	Financial education project proposal (Revised) submission deadline 理財教育計劃書(修訂版)截止遞交日期
9 Nov - 11 Dec 2020	Meetings and implementation of financial education projects 會議及落實理財教育計劃
Within 10 days after the project completion	Submission of report and expense receipts 提交報告及開支單據
<b>19 or 28 Dec 2020</b>	<b>Storytelling for Presentation and Reflection</b> 演說技巧訓練及經驗整理 <b>Venue 地點：</b> 灣仔區 <b>Time 時間：</b> 2:00pm - 5:00pm <b>*Training might be conducted in virtual format based on the actual circumstance</b> <b>*因應實際社會情況或會以網上形式進行</b>
31 Dec 2020	6 shortlisted teams announcement 六支隊伍入圍結果通知
<b>16 or 23 Jan 2021 (Sat)</b>	<b>Presentation and Award Ceremony 匯報會及嘉許禮</b> <b>Venue 地點：</b> 港島區 <b>Time 時間：</b> 10:00am - 3:00pm <b>*Ceremony might be conducted in virtual format based on the actual circumstance</b> <b>*因應實際社會情況或會以網上形式進行</b>

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

Please email the enrolment form attached with financial education project proposal on or before 9 October 2020 to

[serena.wong@sjs.org.hk](mailto:serena.wong@sjs.org.hk)

請填寫一份申請表及理財教育計劃書，於截止日期 **2020 年 10 月 9 日或之前**，以電郵遞交至 [serena.wong@sjs.org.hk](mailto:serena.wong@sjs.org.hk)

## Personal Finance Ambassador Programme 2020/21

### 個人理財大使計劃 2020/21

NOTES:	備註：
Please fill in the form and complete all items consistently in either Chinese or English. Please contact Career Sparkle of St. James' Settlement if you wish to amend personal data after submitting this application. Information of unsuccessful candidates, if not needed, will be destroyed after the recruitment exercise. <b>Please send the completed forms to <a href="mailto:serena.wong@sjs.org.hk">serena.wong@sjs.org.hk</a></b> <b>Submission Deadline: 9/10/2020</b>	請劃一以中文或英文填寫此申請表 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 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 <b>請將填妥的表格電郵至 <a href="mailto:serena.wong@sjs.org.hk">serena.wong@sjs.org.hk</a></b> <b>截止提交日期：2020 年 10 月 9 日</b>

## 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) Vice Leader 副隊長

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			

#### (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			

**(6) 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**

- 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。
- 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。
- 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。
- 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。
- 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》所轉載的規定，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) may be used for the purposes of providing you with information of Investor and Financial Education Council, St. James' Settlement, activities / courses invitation as well as for feedback collection. 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.

閣下之個人資料(包括姓名、電話、傳真、電郵及郵寄地址等)或將用作投委會及聖雅各福群會日後與閣下通訊、活動/訓練課程邀請或收集意見的用途。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。

Should you find such use of your personal data not acceptable, please indicate your **objection** before signing by ticking the box below.

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)

\_\_\_\_\_ (Vice Leader 副隊長)

\_\_\_\_\_ (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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Date 舉行日期	Implementation Time/Period 舉行時間/時段	Venue 地點
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Project Title 計劃名稱
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Objectives 目標

Details 内容

Estimated Impact 預計成效	Estimated Reach 預計接觸人數
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**Budget 預算**

Items 項目	Unit Price 單價	No. of Items 數量	Total 總數
Total 總數			