



HKIAAT Trust Fund

Application for Loan

Please complete the form clearly and correctly and submit together with necessary documents either in person or by post to the HKIAAT. You should read the Guidance Notes carefully before you complete the Form.

(A) Personal Particulars	
Name in English (Mr/Ms/Mrs/Miss) _____	Name in Chinese _____
HKID card no. _____	Student no. _____
Home tel. no. _____	Mobile/pager no. _____
Home address _____ _____	
(B) Occupation	
Employment status	<input type="checkbox"/> Self-employed <input type="checkbox"/> Full-time employed <input type="checkbox"/> Part-time employed <input type="checkbox"/> Full-time study <input type="checkbox"/> Others _____
Name of company _____	
Office address _____ (P.O. Box is not accepted)	
Office tel. no. _____	Office fax no. _____
Position _____	Years of service _____
Monthly income (HK\$) _____	Other income (HK\$) _____
Correspondence Address <input type="checkbox"/> Home <input type="checkbox"/> Office	
(C) Reason for Application	
<input type="checkbox"/> Unemployment	
<input type="checkbox"/> Unemployment of family members, please specify _____	
<input type="checkbox"/> Sudden financial need, please specify _____ _____	
<input type="checkbox"/> Other reason for financial assistance, please explain _____ _____	
No. of dependents/family members _____	Total family income (HK\$) _____ (including my income)
Live with <input type="checkbox"/> Parents <input type="checkbox"/> Siblings, how many _____ <input type="checkbox"/> Alone <input type="checkbox"/> Others _____	

(Personal Data (Privacy) Ordinance: All personal data provided in this form will be used by HKIAAT for the assessment of loan application only. The provision of personal data by means of this form is voluntary. However, insufficient information may result in rejection of an application. Data collected is accessible only to officers and persons processing the loan application.)

Applicants may inspect their personal data kept by HKIAAT. They have the right to make any corrections thereto. For inspection, applicants should contact the Administrative Officer dealing with membership at 27/F, Wu Chung House, 213 Queen's Road East, Wanchai, Hong Kong (Tel: 2823 0600.)

(D) Loan Information

Loan amount applied (HK\$) _____

Repayment term proposed (HK\$) _____ per month starting from _____ for _____
(month/year) (no. of instalments)

The loan will be used for financing:

HKIAAT annual fee (HK\$) _____ for the year _____

HKIAAT examination fee:

AAT Examination Exam session: _____ Paper no. _____ Total fees: (HK\$) _____
 PA Exam session: _____ Total fees: (HK\$) _____
 PBE Exam session: _____ Paper no. _____ Total fees: (HK\$) _____

Accounting course

Course type: Certificate Diploma Higher Diploma Associate Degree
 Degree Others

Name of education institute _____

Course title _____ Total fee: (HK\$) _____

Duration of course _____ Commencing _____

(E) Referees

(1) Name (Mr/Ms/Miss/Mrs) _____ Relationship _____

Address _____

Contact telephone no. _____ Occupation _____

(2) Name (Mr/Ms/Miss/Mrs) _____ Relationship _____

Address _____

Contact telephone no. _____ Occupation _____

(F) Declaration

■ I declare that the above information is true and complete to the best of my knowledge and belief and I authorise the HKIAAT to contact all necessary parties for verification.

■ I have had no conviction involving fraud, dishonesty or professional misconduct either locally or overseas.

■ I waive all claims against HKIAAT for any loss or damage I may suffer arising from this application.

_____ Date

_____ Applicant's Signature

_____ Parent's Signature (if applicant is a full-time student)

FOR OFFICE USE ONLY

Application date:

Checked by:

Amount of loan approved:

Remarks:

Repayment term approved:

APPLICATION FOR LOAN
CHECKLIST FOR APPLICANTS

Before submitting your application, you are reminded to ensure that all documents are in order. (Note that the submission of applications without the required supporting documents will delay the processing procedure.) The following checklist is provided to assist you in preparing your supporting documents.

Indicate the documents you have attached to your completed application form by a “✓” in the appropriate boxes below:

Documents to be submitted by ALL applicants

- A CERTIFIED* true copy of your Hong Kong Identity Card/Passport, if you are not submitting the application to the HKIAAT office in person (Note 1).
- A CERTIFIED* true copy of your latest tax return. If the applicant is a full-time student, the tax return of all family members who have an income must be submitted.
- A CERTIFIED* true copy of your latest 3 months bank statement or savings passbook showing income.
- HKIAAT annual fee payment advice; OR
- HKIAAT examination / exemption application form (duly completed) with supporting documents required; OR
- A CERTIFIED* true copy of relevant documents of acceptance from education institute with tuition fee advice.

* **Certification of documents** – Applications should be supported by originals or certified true copies that have been verified by any of the following persons:

- a. a member of any professional accountancy body (e.g. a member of the HKICPA);
- b. a legal practitioner;
- c. a government district office (through statutory declaration); or
- d. an HKIAAT authorised staff member (only if the originals are presented with photocopies for certification).

Note 1: Applicants applying in person at the HKIAAT office are required to present the original copy of their Hong Kong Identity Card / Passport for verification.