

**For Office Use Only:** Council's approval given on \_\_\_\_\_ Membership status effective from \_\_\_\_\_

<b>2023/24 Membership Year:</b> <i>(tick "✓" as appropriate)</i> <i>(see notes 1 &amp; 2)</i>	<b>Type of Application</b> <input type="checkbox"/> New Membership <input type="checkbox"/> Change of Membership Status <input type="checkbox"/> Reinstatement of Membership Status	<b>Category of Membership</b> <input type="checkbox"/> Fellow Member <input type="checkbox"/> Associate Member <input type="checkbox"/> Ordinary Student Member <input type="checkbox"/> University Student Member
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Payment enclosed HK\$ \_\_\_\_\_ Cash/Bank Transfer/Cheque No. \_\_\_\_\_ Date \_\_\_\_\_

## Part I: Personal Particulars (see note 3)

Name (Mr/Mrs/Ms/Miss/Dr/Prof) (English) \_\_\_\_\_  
(Last / Surname) (First / Given) (as printed on ID card/passport)

(Chinese name) \_\_\_\_\_ Gender \_\_\_\_\_ Year of Birth \_\_\_\_\_  
(if applicable & as printed on ID card/passport) (YYYY)

Name of Employer / Institution \_\_\_\_\_ Position \_\_\_\_\_

Address \_\_\_\_\_

Tel (Office) \_\_\_\_\_ Tel (Mobile) \_\_\_\_\_

E-mail (Office) \_\_\_\_\_ E-mail (Personal) \_\_\_\_\_

## Part II: Overseas Professional Membership and Education (see note 3)

Please indicate in the appropriate box(es) your current membership category and the overseas professional body you belong to. *(Applicants for **Fellow and Associate Member status** are required to provide a certified true copy of the membership certificate(s) (see note 4) and indicate the year of qualification. Applicants for **Student Member status** are required to provide a certified true copy of the examination result notice(s) and indicate examination(s) passed, if any.)*

Overseas Professional Body	Fellow		Associate		Student
	Year of Qualification	Certificate Attached (✓)	Year of Qualification	Certificate Attached (✓)	Result Notice Attached (✓)
The Institute of Actuaries of Australia					
Casualty Actuarial Society					
Faculty of Actuaries*					
Institute of Actuaries (UK)*					
Society of Actuaries					
Others (see note 5) – please specify:					

\* Renamed as the Institute and Faculty of Actuaries on 1 August 2010

### For Applicants for **University Student Member status** ONLY - Additional Information

- 1 Are you currently a full-time student taking a university programme?  
 Yes (Complete the information below and provide a copy of student ID)  No (You are not eligible for this status)

Name of Institution \_\_\_\_\_

Name of Course / Programme \_\_\_\_\_

Current Year of Study \_\_\_\_\_ Expected Year of Graduation (YYYY) \_\_\_\_\_

**Name of Applicant:**

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- 2 If you have not taken or passed any overseas actuarial examinations, please indicate:  
 (a) why you are interested in actuarial or other actuarial related statistical work?  
 (b) what is/are your aim(s) to join the Actuarial Society of Hong Kong ("ASHK")?  
 (Note: If space provided is insufficient, please supply information on a separate sheet.)
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**Part III: ASHK Examination**

For Applicants for **Fellow Member Status ONLY**

When did you pass the ASHK Examination? \_\_\_\_\_ (MM/YYYY)

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**Part IV: Nature of Employers and Area of Work**

Please ✓ **ONE** box for Type of Employer and **ONE** box for Area of Work:

**Type of Employer** (Nature of the company for which you work)

Insurance Company (I)		Other Employers (O)	
Life	LI	Public / Government Service	PO
General	GI	Education Establishment	EO
Composite	CI	Industry	IO
Reinsurance	RI	Financial Institutions	FO
Other	OI	Other - please specify:	OO
Consulting Firm (C)		Miscellaneous (M)	
Primarily: Benefits and Actuarial	BC	Part-Time / Semi-Retired / Unpaid Work	PM
Primarily: Accountancy	AC	Not Employed	UM
Primarily: Management	MC	Full time student	SM
Other	OC	Retired	RM

**Area of Work** (Nature of principal area of your work within the company)

Life Insurance (L)		Retirement Scheme (R)	
Product Development / Marketing / Sales	PL	Scheme Manager	MR
Statutory Valuation	SL	Scheme Actuary	AR
Financial Investigation / Profit Testing / Valuation	FL	HR / Benefits	BR
Corporate Planning	CL	Investment	IR
Reinsurance	RL	General	GR
Risk Management	RML	Other - please specify:	OR
Other - please specify:	OL		
General Insurance (G)		General Corporate Management (GCM)	
Reserving	RG	General Corporate Management	GCM
Pricing	PG		
Risk Management	MG		
Financial Planning / Management Information	FG		
Reinsurance	REG		
Other - please specify:	OG		
Finance / Investment (F)		Others (O)	
Investment Management	IF	Actuarial Audit	AO
Risk Management	RF	Healthcare	HO
Sales / Marketing	SF	Training / Education / Personnel	TO
Product Development	PF	Regulatory	RO
Performance Measurement	MF	Information Technology / Data analytics	IO
Other - please specify:	OF	Other - please specify:	OO

**For Actuaries with statutory roles / senior actuaries ONLY:**

The ASHK organises an annual symposium for Appointed Actuaries. To help us keep our list of Appointed Actuaries up-to-date, please provide us with the following information:

[Please ✓ as appropriate]

I am a

- Appointed Actuary       Pensions Actuary       General Insurance Reserve Signing Actuary  
 Chief Actuary of HK branch       Regional Chief Actuary       other head or senior actuarial position

For (company name(s)): \_\_\_\_\_

**Part V: Preference**

- 1 The ASHK intends to use members' personal data including name, email address and correspondence address to inform members' of the ASHK's membership services and activities (e.g. actuarial job advertisements, newsletters, conference/evening talk/luncheon and research organised or supported by the ASHK or other organisations).

If you object to the proposed use of your personal data as described, please tick the box:

ASHK members may opt out from receiving such ASHK communications at any time by accessing the Login Area on the ASHK website (Membership > Member Zone > Member Login > Personal Information > Preference) or by sending an email to the ASHK Office at [info@actuaries.org.hk](mailto:info@actuaries.org.hk).

- 2 Following the preceding question, please indicate your preferred email(s) for receipt of ASHK's general mailings:

- Office       Personal

- 3 Please tick the appropriate box(es) of your membership information to be shown in the membership directory/search (see notes 3 & 6).

- I wish the following information to be shown in the membership directory/search.

*[If I choose to be displayed in the membership directory/search, I understand that my name will be shown. Members' identification information (year of birth and HKID card/passport no.) and correspondence (home) addresses will not be shown.]*

- Professional Designation(s)  
 Office Tel       Mobile Tel  
 Office E-mail       Personal E-mail  
 Work Details (  Name of Employer    Position    Employer Type    Work Area  
 With Statutory / senior actuarial role)

- I **DO NOT** wish **ANY** of my membership information to be shown in the membership directory/search.

- 4 Please tick the appropriate box(es) to indicate your interest in serving on ASHK Committee(s)/Taskforce(s).

- Actuarial Innovation Committee       Curriculum and Examination Taskforce  
 Financial Reporting Committee       Health Committee  
 General Insurance Committee       Membership & Communications Committee  
 Life Committee       Pension & Employee Benefits Committee  
 Professional Development Committee       Professional Matters Committee  
 Strategy & Statutory Path Committee

**Part VI: Personal Information Collection Statement**

- 1 The ASHK will use members’ personal data for administration and management purposes including, but not limited to, membership admission, registration maintenance, accreditation of qualifications, enforcement of members’ compliance with the Articles of Association and By-Laws (e.g. Continuing Professional Development) as well as any other Rules and Regulations of the ASHK for the time being in force and related matters, nomination for appointments in ASHK’s Council/Committee(s)/Taskforce(s), compilation of ASHK membership directory/search and statistics, general mailing and communication activities, research and development, promotion of the profession and the ASHK, provision of membership services and activities and handling of enquiries, feedback, complaints or disciplinary action. The ASHK will only retain personal data collected for such period as may be necessary for the carrying out of the above purposes and destroy any documents containing personal data it holds in accordance with its internal policy and applicable laws.
- 2 **It is obligatory for members to supply the ASHK with the data in this form except as otherwise specified and if a member fails to supply such data the ASHK will not be able to process the member’s form / application.**
- 3 The ASHK may exchange information with any of the International Actuarial Association (“IAA”) full member associations including the IAA relating to the ASHK’s membership. This includes, but is not limited to, the provision to any disciplinary investigations team of ASHK of information on or relating to any investigation, finding, decision and determination undertaken or issued by a member’s primary professional regulator in relation to the member’s conduct, for the purpose of possible consideration under the ASHK’s disciplinary scheme.
- 4 ASHK members may request at reasonable intervals to be informed of and have access to their own data held and have such data corrected or erased where appropriate. The ASHK’s privacy policy is available on its website: [www.actuaries.org.hk](http://www.actuaries.org.hk). ASHK members can write to [info@actuaries.org.hk](mailto:info@actuaries.org.hk) for any queries on the ASHK’s privacy policy.
- 5 Direct Marketing  
Pursuant to the Personal Data (Privacy) Ordinance, ASHK members may object to the proposed use of personal data as described in Part V Preference – Point 1 by ticking the appropriate box.

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**Part VII: Declaration**

By my signature below,

- 1 I declare that the information in this application form is, to the best of my knowledge and belief, accurate and complete. I hereby wish to apply for admission as (tick “✓” as appropriate):

Fellow Member  Associate Member  Ordinary Student Member  University Student Member

of the ASHK and in the event of my being elected, I agree to abide by the Articles of Association and By-Laws (e.g. Continuing Professional Development) as well as any other Rules and Regulations as issued by the ASHK.

- 2 I am not an undischarged bankrupt or with affairs currently subject to an arrangement with creditors or other external administration or with any such proceedings pending against me.
- 3 I declare that I have read the above and I have no objection to the above save as otherwise expressly stated.

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Applicant's signature

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Date

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**Part VIII: Nomination** (see note 7)

We, the undersigned, are satisfied with the applicant and believe him/her to be eligible in every respect for admission to the ASHK.

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Proposer's name

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Proposer's signature

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Date

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Secunder's name

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Secunder's signature

## CHECKLIST FOR APPLICANTS

Please note that incomplete application will delay the processing procedure. Before submitting your application, you are reminded to ensure that all documents are in order. The following checklist is to assist you in completing the application and preparing the supporting documents.

- All information is filled out properly.
- The form is completed, signed and dated. These includes Part VIII: Nomination, irrespective of new membership or change/reinstatement of membership status.
- Certified true copy of your membership certificate(s) (*For Fellow and Associate Member status*) / examination result notice(s), if appropriate (*For Ordinary and University Student Member status*) are attached. (**EXEMPTION** for applicants seeking reinstatement whose membership category remains unchanged)
- A copy of student ID (*For University Student Member status ONLY*) is attached.
- Your resume is attached. (For applicants whose overseas professional qualification was attained from actuarial bodies other than those shown in the Part II's table **OR** applicants who are unable to find ASHK members as their nominators **ONLY**)
- Subscription fee is settled (see note 2).

## ACKNOWLEDGEMENT OF RECEIPT

### For ASHK Membership Application Form Submitted in Person

To: \_\_\_\_\_ (Name of Applicant)

We acknowledge receipt of your ASHK membership application and/or payment (Amount: HK\$ \_\_\_\_\_; Cash/Bank Transfer/Cheque No. \_\_\_\_\_).

Please note that your application is subject to the approval of the ASHK Council at its forthcoming meeting (*refer to the ASHK website for meeting schedule*). Upon approval, we will send you a confirmation email and you can download an e-receipt at the "Login Area" on the ASHK website (click "Payment History").

If you have any issues or further queries regarding your application, please contact us by email at [info@actuaries.org.hk](mailto:info@actuaries.org.hk).

\_\_\_\_\_  
Actuarial Society of Hong Kong

\_\_\_\_\_  
Date

## NOTES

1 The term of the year 2023/24 is from 1 October 2023 to 30 September 2024. Applications can be submitted in person or by mail to the office of the Actuarial Society of Hong Kong (“ASHK”) by completing this form and submitting with the appropriate subscription fee and relevant documentary evidence (see notes 4, 5 & 7).

2 **New Membership:** Applications should be accompanied by payment of the new member application fee (Fellows - HK\$2,460; Associates - HK\$1,540; Ordinary Student – fee waived; University Students – HK\$200) plus the 2023/24 annual subscription fee (Fellows - HK\$2,460; Associates - HK\$1,540; Ordinary Students - HK\$400; University Students – fee waived). New members joining *after 1 April 2024*, need only pay the new membership application fee plus half the annual subscription fee.

**Change of Membership Status:** Current members who wish to change their membership category during the year 2023/24 are not required to pay their new status’ subscription fee if they have already settled their old status’ subscription fee. However, this particular payment arrangement is not applicable during the renewal process, normally from October to November each year.

**Reinstatement of Membership Status:** Condition A) For former members who have let their membership lapsed, they are required to pay a reinstatement charge of HK\$500 plus the 2023/24 annual subscription fee if they wish to restore their membership status. Condition B) However, former members who did not renew their membership due to relocation overseas or unemployment, need only pay the annual subscription fee if they wish to rejoin the ASHK. A signed letter stating briefly their whereabouts and the period of working abroad or unemployment is required.

However, reinstatement charge is WAIVED for university student members who are not engaged in any full-time job.

**Retired Member:** Retired members are granted a 80% off the membership subscription fee. To apply, they are required to submit a declaration form (available on the ASHK website) at the point of membership application. The criteria for a “retired member” are set out on the ASHK website under the “Membership” section.

For ease of reference, here is a payment table showing **TOTAL FEE** required for each member status under different application types and periods:

Total Fees Required		Make payment during the period		Make payment during the period	
		1 October 2023 – 31 March 2024		1 April 2024 – 30 September 2024	
Type of Applications					
New Membership	Fellow	HK\$4,920		HK\$3,690	
	Associate	HK\$3,080		HK\$2,310	
	Ordinary Student	HK\$400		HK\$200	
	University Student	HK\$200		HK\$200	
Change of Membership Status	Fellow	---		---	
	Associate	---		---	
	Ordinary Student	---		---	
	University Student	---		---	
Reinstatement of Membership Status		Condition A	Condition B	Condition A	Condition B
	Fellow	HK\$2,960	HK\$2,460	HK\$1,730	HK\$1,230
	Associate	HK\$2,040	HK\$1,540	HK\$1,270	HK\$770
	Ordinary Student	HK\$900	HK\$400	HK\$700	HK\$200
	University Student	HK\$200		HK\$200	

Fees can be paid by either one of the following methods:

**Cash:** In person during ASHK’s office hours.

**Cheque:** Payable to “The Actuarial Society of Hong Kong” and submit to ASHK Office.  
Post-dated cheque will NOT be accepted.

**ATM/Bank Transfer:** Remit to ASHK bank account with details below.

Please ensure that 1) **the amount of remittance includes both the fee and a bank charge of HK\$65** (excluding transactions from HSBC / Hang Seng Bank accounts) for processing bank transfer. **All bank charges must be met at your end.** 2) the payment details include the invoice reference number. 3) a copy of the transfer slip will be emailed to info@actuaries.org.hk.

Account name: The Actuarial Society of Hong Kong  
 Account number: 511-105199-001  
 Bank name and address: The Hongkong and Shanghai Bank Corporation Limited  
 Main branch, 1 Queen’s Road, Central, Hong Kong  
 Bank code number: 004  
 Bank Swift code: HSBCHKHHHKH

## NOTES

- 3 Personal data collected will be used for administration and management purposes including, but not limited to, membership admission, registration maintenance, accreditation of qualifications, enforcement of members' compliance with the Articles of Association and By-Laws (e.g. Continuing Professional Development) as well as any other Rules and Regulations of the ASHK for the time being in force and related matters, nomination for appointments in ASHK's Council/Committee(s)/Taskforce(s), compilation of ASHK membership directory/search and statistics, general mailing and communication activities, research and development, promotion of the profession and the ASHK, provision of membership services and activities, and handling of enquiries, feedback, complaints or disciplinary action. The personal data collected will be treated as strictly private and confidential, and is not intended to be used for commercial mass contact purpose. ASHK will only retain personal data collected for such period as may be necessary for the carrying out of the above purposes and destroy any documents containing personal data it holds in accordance with its internal policy and applicable laws.
- 4 ASHK accepts certified true copies of the membership certificate(s) / examination result notice(s) which must be signed by **either one** of the ASHK member nominators (see note 7). To do so, applicants should take photocopies of the certificate(s) / examination result notice(s). One of the ASHK member nominators must certify the certificate(s) / examination result notice(s) by:
- (a) writing on each copy that "This is a true copy of the original certificate / examination result notice"; and
  - (b) writing down his/her name, signing and dating the declaration.
- The nominator who certifies the certificate(s) / examination result notice(s) must provide the same handwritten signature. Certificate(s) / examination result notice(s) in any language other than English must be accompanied by certified English translations.
- Alternatively, applicants can certify their certificate(s) / examination result notice(s) at the HKSAR Government District Office through statutory declaration OR by presenting the originals and photocopies to the ASHK staff if submitting their applications in person.
- ONLY former members applying for reinstatement whose membership category remains unchanged can be EXEMPTED from this certification requirement.**
- 5 If applicants have attained an overseas professional qualification from actuarial bodies other than those shown in the Part II's table, approval of their applications would be at the Council's discretion. Applicants are required to provide a resume and a certified true copy of membership certificate(s) / examination result notice(s) issued by the relevant actuarial bodies or similar documentary evidence (academic certificate / transcript) together with this form.
- 6 The membership directory/search is available at the ASHK website and can be accessible by members only.
- 7 Applications for **University Student Member** status require two ASHK member nominators, of whom at least one is a Fellow Member. However, this form may be submitted without nominations and the ASHK office will assist with finding the two members, a short conversation may be arranged between the applicant and the nominator(s). Applications for **Ordinary Student and Associate Member** statuses require two ASHK member nominators, of whom at least one is a Fellow Member. Applications for **Fellow Member status** require two ASHK Fellow Member nominators. If applicants are unable to find ASHK members as their nominators, their applications should be supported by a resume and a certified true copy of membership certificate(s) / examination result notice(s) issued by the relevant actuarial bodies or similar documentary evidence (academic certificate / transcript).
- 8 The Council will consider and approve applications received at its monthly meeting (refer to the ASHK website for meeting schedule). Successful new member applicants will be notified by email.