

HKSI Institute Student Membership Application Procedure

Begin Your Membership Application



Step 1:

Click HKSI Institute Website <https://eform.hksi.org/membership-application/landing> for membership application

Step 2:

If you have created the online portal with us before, please click "**Login to Online Portal**". For new users, please click "**Apply Here**". After reading the notes for applicants, proceed by clicking "**Acknowledge and continue**"

Step 3:

Click "**Yes**" to proceed with Student Membership Application

Step 4:

Click "**Apply Now**" to apply for the student membership. The fee will be HKD100 if you are going to join the Case Competition, provided you follow the required steps at next page

If you have an Online Portal account, please login and apply for HKSI Institute Membership via the "EFORM" tab. Otherwise please press "Apply Here".

Login to Online Portal

Apply Here

Q1. Are you currently a post-secondary **FULL-TIME** student?

Yes

No

You are eligible to apply:
Student Membership (UHKSI)

Annual Fee: **HKD 300**

Time required: Approximately 1 to 2 weeks

Apply Now

Return

Input your Personal Information



Step 5: Fill in your personal information, including FULL address details and contact information

Personal Particulars

*Salutation Mr		
*Surname chan	*Given Name Tai Man	Preferred Name Tom
Surname (Chinese) 陳	Given Name (Chinese) 大文	*Date of Birth January 2008

Contact Information^①

*Address Residential Address 17/F, Cambridge House Taikoo Place 979 King's Road Quarry Bay Hong Kong	*Email Personal Email ☐ testing@gmail.com School Email ☒ (Preferred) testing@abcu.edu.hk Verify Email Please click the button to verify preferred email.	*Phone Mobile Phone Number Hong Kong (852) 98765432
---	---	---

Verify Email Address



OTP email



Inbox



HKSI Institute 16 Jul
to me



Dear applicant,

Please input the One-Time Password (OTP): **hNEGwi** to complete your email verification for the HKSI Institute Membership application.

Thank you.

Best Regards,
HKSI Institute

敬啟者：

請輸入一次性密碼 (OTP)：**hNEGwi** 驗證閣下提供的電郵地址，以申請學會會籍。

謝謝。

此致
香港證券及投資學會

*Email

Personal Email ☐

testing@gmail.com

School Email ☒ (Preferred)

testing@abcu.edu.hk

Verify Email

Please click the button to verify preferred email.

*Phone

Mobile Phone Number

Hong Kong (852)

98765432

*Email

Personal Email ☒ (Preferred)

testing@gmail.com

School Email ☐

testing@abcu.edu.hk

OTP Code

A verification code has been sent to your preferred email address.
If you have not received it, please try again after 3 minutes.

Confirm OTP

*Phone

Mobile Phone Number

Hong Kong (852)

98765432

Step 6: Remember to click "Verify email" once you have entered your preferred email (personal or school email), and then input and "Confirm OTP"

Upload your Academic Supporting Documents



Academic Information

*Full Name of Education Institution City University of Hong Kong		*Location or Country of Education Institution Hong Kong	
*Full Name of Programme Bachelor of Business Administration in Marketing	*Admission Date September 2026	*Expected Graduation Date June 2030	Levels of Academic Degree Bachelor Degree

Please attach photocopies of documents that verify the following information:

- **"Full-time" student status**
- **Expected graduation date**

Note: Students might submit **two documents** to meet the above requirements. Please click [HERE](#) for detailed guidelines.

*You may select multiple files in one upload

Choose Files No file chosen

Step 7: Fill in your academic information. Remember to upload the supporting documents that display your **"full name"**, **demonstrate your "full-time undergraduates" status**, and **include your expected graduation year and month**. Please refer to last section for more details.

Select “Case Competition” under Source of Information



Source of information

I learned about the HKSI Institute and its membership from

Case Competition

Reason for application

Which type of activities organised by the Institute are you most likely to participate in near future?

Mentorship or Internship

Communication of HKSI Institute Services

- ☒ I would like to stay updated on the member benefits, activities, services, training courses and examinations provided by the HKSI Institute.
Upon approval of your application, you may change your preference any time through [Online Portal](#).

Return

Next

Step 8: Remember to select “**Case Competition**” under “**Source of Information**” to enjoy the special membership offer at HKD100

Declare and Preview your Application



Disciplinary Record

Have you been disciplined in any way - i.e. cautioned, fined, suspended or awarded any kind of penalty or punishment by any authority - in the last five (5) years?

☒ No, I have NOT been disciplined ☐ Yes, I have been disciplined

Applicant's Declaration

Please acknowledge the section by putting a "✓" in all boxes. By submitting this application form

- ☒ I declare that the information I have provided is complete and correct and undertake to notify the HKSI Institute any other information which is relevant to this application, and any changes on information contained in this form prior to admission to membership.
- ☒ I hereby authorise the HKSI Institute to contact relevant bodies to check and verify the truth and accuracy of the information submitted in this application.
- ☒ I acknowledge that the provision of any untrue or incorrect information, or failure to provide personal data, or withholding any such information from, misleading, or attempting to mislead the HKSI Institute on any point will be deemed an act of misconduct and may result in my application being refused.
- ☒ I confirm that I have read, understand and agreed the contents of the HKSI Institute's [Articles of Association](#), [HKSI Institute Membership Rules](#), including the Code of Ethics, and [Personal Information Collection Statement \("PICS"\)](#).

Return

Preview

Step 9: Complete the “Disciplinary Record” and “Applicant’s Declaration” sections, and click “Preview” to proceed.

Double Check Information and Application Fee



You are applying for the following:
Student Membership (UHKSI)

Total Fee: HKD 100

Personal Particulars

*Salutation
Mr

*Surname
Wu

*Given Name
[Redacted]

Preferred Name
[Redacted]

Surname (Chinese)
[Redacted]

Given Name (Chinese)
[Redacted]

Chinese Preferred Name
[Redacted]

*Date of Birth
[Redacted]

HKID Card Number
[Redacted]

Passport Number
[Redacted]

*Address

**Residential Address



Step 10:

Confirm the “Total Fee” shown is **HKD100** and all required information has been completed. Click “Submit” to proceed with the payment.

Academic Information

*Full Name of Education Institution
City University of Hong Kong

*Full Name of Qualification
Bachelor of Business Administration in Marketing

*Admission Date
September-2025

File
Chan Tai Man_student ID.png

*Location or Country of Education Institution
Hong Kong

*Expected Graduation Date
June-2029

Source of information

Case Competition

Reason for application

Mentorship or Internship

Disciplinary Record

NO, I have NOT been disciplined.

Applicant's Declaration

I declare that the information I have provided is complete and correct and undertake to notify the HKSI Institute any other information which is relevant to this application, and any changes on information contained in this form prior to admission to membership.

I hereby authorise the HKSI Institute to contact relevant bodies to check and verify the truth and accuracy of the information submitted in this application.

I acknowledge that the provision of any untrue or incorrect information, or failure to provide personal data, or withholding any such information from, misleading, or attempting to mislead the HKSI Institute on any point will be deemed an act of misconduct and may result in my application being refused.

I confirm that I have read, understand and agreed the contents of the HKSI Institute's Articles of Association, HKSI Institute Membership Rules, including the Code of Ethics, and Personal Information Collection Statement ("PICS").

Return Print **Submit**

Process your Payment



HKD 100.00

Select your payment method by clicking on the logo below:

Card

VISA



AM
EX

UnionPay
银联

Internet Banking

PPS
網銀

Digital Wallet

支付宝
ALIPAY

Others

PayPal

HKD 100.00



Card Number :

Expiry Date (mm/yyyy) :

2030

Card Holder Name:

Card Verification Number :



Submit

Cancel

HKD 100.00

Your payment transaction is completed

Payment method :

Card Number :

Expiry Date (mm/yyyy) :

** / **

Name as shown on credit card :

Transaction IP Address :

Payment Reference No. :

Note: This transaction will be recorded in
your bank / credit card account statement
as with merchant name "

Continue

Print

Step 11: Fill in your payment details to complete the process

Record your Submission Number



Submission number: ef000000

Date of submission: 04-09-2025

Membership class: Student Membership

Payment reference:

Your application has been submitted successfully for approval. The processing time might vary depending on the information/supporting documents provided, and our staff may contact you for additional information. Please refer to the submission number above for future reference.

Following this application, a system email with the FIRST-TIME login link has been sent to your email address. Please check your email in an hour, please also check your spam mailbox.

For enquiry, please email to member@hksi.org.

We look forward to having you in the HKSI Institute community!

Leave



*** This is a system-generated email, please do not reply ***

*** 此郵件由電腦系統自動傳送，請勿回覆此電郵 ***

eConfirmation of Application and Payment 確認申請及付款

Dear

Thank you for your application of the Student Membership, and the payment of HKD100. Your submission number is ef000000.

Your payment reference number is SP-

Please login to the HKSI Institute Online Portal (<https://login.hksi.org>) to

1. Download the official receipt (via RECEIPT) and/or
2. View the details of your application (via eFORM).

For enquiry, please email to member@hksi.org. Thank you.

Step 12 (Last step): Record the submission number “ef000000xxxx” which is used to fill in the Case Competition Application Form later. The student membership is subject to final approval by the HKSI Institute.

Remarks :

- Please use designated “source of information” to enjoy the special offer.
- The HKD100 application fee is **non-refundable for unsuccessful applications**, including but not limited to cases with insufficient proof of eligibility or failure to meet qualification criteria.

Action for Unsuccessful Application





Hong Kong Securities and Investment Institute
香港證券及投資學會

*** This is a system-generated email, please do not reply ***

*** 此郵件由電腦系統自動傳送，請勿回覆此電郵 ***

Unsuccessful Application 申請未能成功

Dear [REDACTED],

Membership class 會籍級別: Student Membership
Submission number 申請編號: ef00000 [REDACTED]
Reference Number 參考編號: SP-[REDACTED]

Thank you for your interest in applying for HKSI Institute membership.

We regret to inform you that **your application was unsuccessful** due to no payment received.

To continue, please resubmit your application and complete the payment. Should you have any questions, please feel free to contact us at member@hksi.org

感謝您申請為香港證券及投資學會（HKSI Institute）會員。

由於相關申請費用尚未收到，所以您的申請將不獲處理。

請您重新提交申請表並完成付款，以便本會作進一步跟進。如有任何查詢，請電郵至 member@hksi.org 與我們聯絡。

Yours sincerely,
Membership and Business Development Department



Hong Kong Securities and Investment Institute 香港證券及投資學會
17/F, Cambridge House, Taikoo Place, 979 King's Road, Quarry Bay, Hong Kong
香港銅鑼灣英皇道979號太古坊廣場大廈17樓
www.hksi.org

If you receive this unsuccessful application email or need assistance regarding your membership application, please contact us at member@hksi.org and be sure to include your submission number.

Supporting Document for Membership Application - from Different Institutions

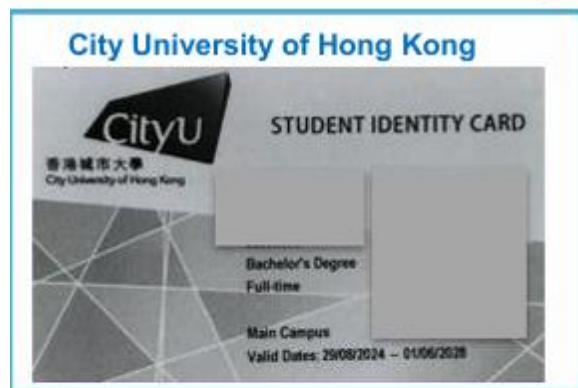
Supporting Document for Membership Application – CityU, HKBU, HKMU, PolyU, HKU, HKSYU Students

Students from:

- City University of Hong Kong
- Hong Kong Baptist University
- Hong Kong Metropolitan University
- The Hong Kong Polytechnic University
- The University of Hong Kong
- Hong Kong Shue Yan University

**Please Submit:
Valid Student ID Card with all
Personal Information Included**

Sample to Prove Your Full-Time Undergraduate Status



Supporting Document for Membership Application – CUHK Students



Students from:

The Chinese University of Hong Kong

Support Document for Membership Application

- Valid Student ID Card **AND**
- Latest Tuition Fee Receipt **OR** School Portal Screenshot

Sample to Prove Your Full-Time Undergraduate Status

The Chinese University of Hong Kong



AND

My Academics

College: S.H. Ho College
Program: BSc Quant Finance & Risk Mgt
Status: Active
Advised Term: 2024-25 Term 1
Admission Date: 01/08/2024
Expected Graduation Term: 2026-27 Term 2
Expected Graduation Date: 31/07/2027
Normative Study End Term: 2026-27 Term 2
Normative Study End Date: 31/07/2027
Maximum Study End Term: 2029-30 Term 2
Maximum Study End Date: 31/07/2030
Study Mode: Full time
Study Year: 1
Plan: Major: QFN & Risk Mgt Science
Plan Requirement Term: 2024-25 Term 1

OR

Student Fee Receipt

Date: 25 October 2024
Page: 1 / 1

Student ID No. [Redacted]
Program: BSc Statistics (Full-Time)
From: 2024-25 Term 1
To: 2024-25 Term 1

Date	Description	Acad. Year	Term	Charges (HKD)
10-09-2024				
10-09-2024				
10-09-2024				

Supporting Document for Membership Application – HKUST Students



Students from:

The Hong Kong University of Science and Technology

Support Document for Membership Application

- Valid Student ID Card **AND**
- Latest Tuition Fee Receipt **OR** Latest Transcript

Sample to Prove Your Full-Time Undergraduate Status



AND

The Hong Kong University of Science and Technology



Ref. No. [REDACTED]
Date 01 Jun 2024

Official Receipt

Student Name	[REDACTED]
Mailing Address	[REDACTED]
Program *	BBA/GRUS 4Y
Academic Load	Full-Time
Acad. Term	2024-25 Fall
Particulars	
Tuition Fee - Undergraduate	2024-25 Fall
Tuition Fee - Undergraduate - offset by Scholarship	2024-25 Fall
	Grand Total
	01 Jun 2024
	20 Aug 2024

(* Note: The Display Program is the latest program, and may not necessarily relate to the above listed payment.)
Remarks: - This official receipt only shows payments settled for tuition fee.

OR

Name: [REDACTED]
Student ID: [REDACTED]
Year of Study: 3rd Year
Print Date: 18 September 2024 18:35:34
Reg. Status: Active in Program

Unofficial Transcript of Academic Record (as of 18 September 2024)

Admitted: [REDACTED]

Academic Program

Initial Date: 1 September 2023
Program: Bachelor of Business Administration
Major: Economics

Program Change: [REDACTED]
Program: Bachelor of Business Administration
Major: Finance

Enrollment: 2024-25 Fall
Information Systems

Academic Records

2023-24 Fall (Full-Time)

2024-25 Spring (Full-Time)

2023-24 Spring (Full-Time)

Page 1 of 2

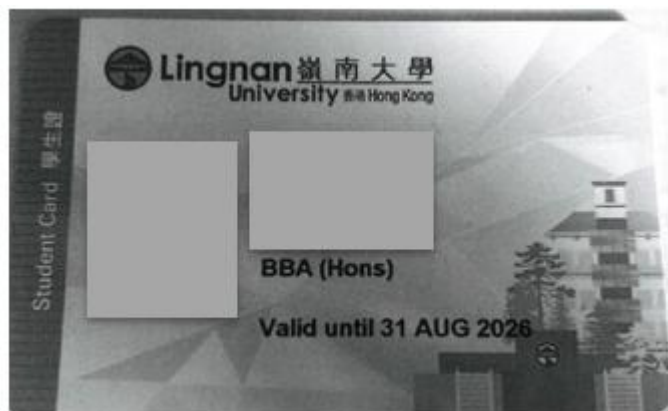
SUBMIT

Supporting Document for Membership Application – Lingnan University Students

Students from:	Support Document for Membership Application
Lingnan University	- Valid student card AND - Admission Letter

Sample to Prove Your Full-Time Undergraduate Status

Lingnan University



AND

LETTER OF ADMISSION 2021-22

Applicant's Name
HKID No.
Application No.
Study Programme
Student No.

Bachelor of Business Administration (Hons)

Congratulations! I am most pleased to inform you that you have been selected for admission as a full-time Year 1 student to the above-stated programme of the University commencing in September 2021.

SUBMIT

Supporting Document for Membership Application – GBA Universities Students



Students from:	Support Document for Membership Application
Students Studying at GBA Universities	Online Verification Report on Student Record showing your full name, "full time status" and expected graduation date

Sample to Prove Your Full-Time Undergraduate Status

教育部学籍在线验证报告	
更新日期: 2023年10月12日	
姓名	
性别	
证件号码	
民族	
出生日期	
院校	
层次	本科
院系	经济学院
班级	
专业	
学号	
形式	普通全日制
入学日期	2022年09月01日
学制	4年
类型	普通高等教育
学籍状态	注册学籍 (预计毕业日期: 2026年07月01日)

SUBMIT

**For Membership Application Enquiry:
Please email member@hksi.org**



Membership Application Link

<https://eform.hksi.org/membership-application/landing>

We look forward to your active participation!

