

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)
28 Sep 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 (校內截止日期為2023年9月20日晚上11:59分)
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 20 September 2023, 11:59pm to HKSYU Office of Student Affairs (osa_finance@hksyu.edu.hk).

請填寫一份申請表及理財教育計劃書, 於截止日期 2023年9月20日晚上11:59分之前, 以電郵遞交至香港樹仁大學學生事務處(osa_finance@hksyu.edu)。