



提升資產財富管理業人才培訓先導計劃

**Pilot Programme to Enhance Talent Training for
the Asset and Wealth Management Sector**

Student Internship Programme

Readiness Briefing Session for Participating Employers



Agenda

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1. Key Updates and Reminders





1.1 Important Dates

- The WAM Pilot Programme will conclude on **31 March 2026**. The HKSI Institute will periodically make official announcements to all stakeholders regarding the arrangements for this final cohort in due course.
- Key timelines for Participating Employers' ("PEs") attention:

Dates	Events
31 July 2025	Deadline for existing PEs to submit new internship positions for approval
15 October 2025	The student application period ends. No student applications will be received by PEs thereafter
31 October 2025	Cut-off for internship commencement
30 November 2025	Cut-off for internship completion
31 January 2026	Deadline for submitting SIP reimbursement applications by PEs



1.2 Programme Quota Applied in SIP 2025/26

Guide for PEs paragraph 7 – 10

- A **quota mechanism** on internship positions introduced in SIP 2024/25 is continued to ensure **fairness** among PEs and provide **different internship opportunities** to eligible students under the available funding.
- Quota is allocated based on the following two criteria (whichever is lower):
 - number of full-time employees of the PE in the Hong Kong office at the time of PE application (or renewal); and
 - number of internship positions requested.

No. of full-time employees of the PE in Hong Kong	Maximum Quota for the PE
1 to 20	5
Above 20	10

Points to note:

- **Full-time employees** excluding interns refer to employees other than those with less than 5 usual days of work per week; or less than 6 usual hours of work per working day; or less than 30 usual hours of work per week.
- The number of quota allocated to a PE should **not exceed** the number of full-time employees.
- The approved and unused quota is displayed on Profile page of the PE Admin Panel (the “Panel”). PE may request **additional quotas** in writing with justification.

Approved Quota ?	2	Unused Quota ?	1
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- Validity of quota allocated: **from the date of approval/renewal as a PE up to 31 October 2025**. A periodic review of the usage of quota will be conducted to ensure fair and effective allocation of funding. Any unused quotas may be revoked or reallocated by the HKSI Institute upon approval from the FSTB.



1.3 Student Eligibility Verification





Guide for PEs paragraph 13, 27, 33

- PEs shall verify students' eligibility **before extending any offers**. You are reminded to check if the students are:
 - 1) **HKSAR residents**;
 - 2) **full-time** undergraduate or postgraduate students in one of the 22 accredited degree-awarding Higher Education Institutions ("HEI"s) in Hong Kong **at internship commencement**; and
 - 3) **lawfully employable** in the HKSAR **throughout the internship period**.
- Documents required for **ALL candidates** on **1)** and **2)**
 - Hong Kong Identity (HKID) Card;
 - Student Identity Card / Transcript / Tuition fee receipt / Screen capture of student's profile on the official on-line portal / Admission letter / any other official documents issued by the HEIs; and
 - Class schedule / letter on leave of absence or other documents/information during school semester as proof of availability for full-time work (where required).
- Additional documents are required for **non-permanent residents** in HKSAR on **3)**
 - Permit obtained to work, e.g. "No Objection Letter" ("NOL") or Immigration Arrangements for Non-local Graduates ("IANG") visa issued by the Immigration Department^(Note 1);
 - Limit of stay (coincides with the entire internship period) on passport remains unexpired; and
 - An endorsement letter from the HEI if required.

Note 1: PEs are strongly encouraged to review the details provided by the Immigration Department:
<https://www.immd.gov.hk/eng/faq/imm-policy-study.html>



1.4.1 New Features on the Panel – Positions

- Following the upgrade of SIP Online Portal in January 2025, **enhanced functions** and **greater flexibilities** are offered to PEs for managing the Panel.
- For posting of internship position, PEs can now:
 - Create and submit **new internship positions** for approval
 - Pressing  **New** button on Position Page and fill in an electronic form
 - Manage **posting** of approved internship positions
 - Press  **Post** button of an Archived or Approved Position to publish the job
 - Press  **Unpost** button of a Posted Position to unpublish
 - Make **amendments** to approved internship positions
 - Press  **Copy & Re-submit** button of an Archived Position to submit for modification
 - For details, please refer to [User Manual of PE Admin Panel for Participating Employer](#)
- New or revised internship positions would be submitted to the Vetting Committee for approval towards the **end of EACH month**. Any submissions later than **31 July 2025** will NOT be processed.



1.4.2 New Features on the Panel - Report of Selected Student Interns, Internship Period and Mentor

PE Admin Panel

PE Admin Panel

Home / Applicant

Filter:

Status: All Shortlist: All

Apply Date: From To

Position: All

University:

Program:

Major:

GPA >=

Page 1 of 1

#	Applicant No. Position No. Position Hiring Company	Applied Date Eng. Name Chi. Name Contact Email	University Major Year of study	Status
1	s2504000004 240029W2502001(01)-002 Institutional Sales Intern SIP Asset and Wealth Management Limited	2025-04-07 14:08:01 Chan Kevin kevinchan@hkisi.org	Hong Kong Shue Yan University Undergraduate Year 2	Normal
2	s2501000001 240029W2502001(01)-001 Research Assistant SIP Asset and Wealth Management Limited	2025-01-17 09:32:31 Tai Man Mike Chan 陳大文 johnnyhung@hkisi.org	The Education University of Hong Kong BBA Undergraduate Year 3	Verified
3	s2503000001 240029W2502001(01)-002 Institutional Sales Intern SIP Asset and Wealth Management Limited	2025-03-05 15:39:26 Siu Man Nick Chan 陳少文 johnnyhung@hkisi.org	The Education University of Hong Kong BBA Undergraduate Year 3	Accepted

Offer Detail:
Internship Date: 2025-03-02 - 2025-04-30
Progress: Contract signed
Remark: Option to extend the internship

Supervisor Detail:
Name: Leslie Chan
Position: Managing Director
Email: test@hkisi.org
Is direct supervisor: No

Offer Detail:
Internship Date: 2025-03-03 - 2025-05-08
Progress: Verbally accepted
Remark: Intra-break applied

Supervisor Detail:
Name:
Position:
Email:
Is direct supervisor: No

Status: Shortlisted Accepted/Submitted Verified Claim

Notes: Student applications will be automatically wiped out when hanging longer than three months.

Guide for PEs paragraph 28, 34

- PEs are required to **report** the student offers to the HKSI Institute by submitting details of the student intern through the Panel:

- Search your selected student intern on Applicant page.
- Press **View / Edit Offer** button to open and fill in the offer details and click **Accept Offer** button to report.

Points to note:

- the internship start date should not fall on public holidays;
- internship shall **commence before the expiry of student status**;
- duration must be **at least 1 month**; and
- last internship commencement date is on **31 October 2025**.

Offer Applicant Info

Guide

Tips on procedures to report an offer under the SIP:

STEP 1 - Fill in information for General part on this form, and press Accept Offer button at the bottom.

STEP 2 - Complete the rest of this form including both Supervisor / Mentor and Verification parts, and press Submit Offer button at the bottom, preferably within ONE WEEK after internship commencement.

General

Candidate Status: Normal

Tentative Start Date: 2025-04-10 Tentative End Date: 2025-06-20

Progress: ☐ Contract signed ☒ Verbally accepted

Remarks:

Accept Offer



1.4.2 New Features on the Panel - Report of Selected Student Interns, Internship Period and Mentor

Supervisor / Mentor

Title: Mr Name: Position: Email: Direct supervisor of Mentee: ☐ Yes ☐ No

Verification

Document Holding

☐ Hong Kong Permanent Identity Card

☐ Hong Kong Identity Card, and Student Visa / Entry Permit

☐ Hong Kong Identity Card, and Other Visa / Entry Permit

FULL-TIME student identity documents (allow zip file for multiple documents)

Work permit documents (allow zip file for multiple documents)

Tips: HKID card image is NOT required.

Report Date: 2025-03-05 Verification Completion Date:

3

Submit Offer

Guide for PEs paragraph 28, 34

3 After completing the student verification, PEs continue to fill in the rest of the form, including

- Supervisor / Mentor Part; and
- Verification Part

and upload the student documents. Please click [Submit Offer](#) button to submit the collected documents to the HKSI Institute for review, preferable allowing 1-2 weeks before internship commencement.

4 PEs will receive an email notice to **get student intern verified**. HKSI Institute may request additional documents to complete the verification process.

For details, please read [User Manual of PE Admin Panel for Participating Employer](#).

ATTENTION!!!

Subsidy will **NOT** be approved if the student intern fails to meet the eligibility criteria.

WAM SIP Notice - Verification Completed Successfully

To Cc

24/03/2025

4

The Pilot Programme to Enhance Talent Training for the Asset and Wealth Management Sector (the WAM Pilot Programme) Student Internship Programme (SIP)

Participating Employer: SIP Asset and Wealth Management Limited

Date: 24-03-2025

Action: Verification Review

Position Title: Research Assistant

Position Number: 240029AB2501001(01)

Intern Name: Tai Man Chan

Status: Confirmed completion to satisfactory

SAMPLE

For details, please log in and view in [PE Admin Panel](#).

** This is a system generated message, please do not reply. **



1.5 Work-From-Home (“WFH”) Arrangement

Guide for PEs paragraph 38 – 39

- Interns are expected to **work physically in the offices** of the PEs in Hong Kong throughout the internship period.
- WFH working mode can only be arranged at a **maximum of 1 day per week** and should follow the policy of other full-time employees or in accordance with the guidelines / recommendations issued / made by the regulators or HKSAR Government from time to time.

Points to note:

- Notify the HKSI Institute as soon as practical if it is inevitable to have WFH arrangement for interns due to **unexpected situation**. PEs are requested to:
 - provide **sufficient supervision** on interns’ job performance and daily attendance;
 - assign **meaningful WAM-related work assignments** to the student interns;
 - offer adequate equipment setting to facilitate **effective communication** with the interns; and
 - establish and maintain **adequate controls** to mitigate any additional risks unique to WFH arrangements.



2. Internship placement





2.1 Role of PE (1)

Onboarding arrangements

- Be prepared :
 - Workstation/equipment/seating/stationery supplies set-up; and
 - **Advance notification with proper briefing** to internal managers/respective team prior to interns' onboarding.
- Formal/Informal Orientation
 - **Overview** on organisation;
 - Communication on **all applicable rules/policies**, especially under WFH arrangement (Lunch/break/start and end time, who and how to report if absent or late, dress code, confidentiality codes, social media usage, safety regulation etc.);
 - Completion of new employee formalities (e.g. staff record form, MPF enrolment, etc.);
 - Office tour/meet with fellow colleagues/co-workers;
 - Person to consult and go to if encounter problems; and
 - **Mentor** introduction.



2.1 Role of PE (2)

Placement supervision

- Assign and explain responsibilities/tasks to the student interns;
- Student interns can only work for the **eligible PE company** or **organisation** which has been approved under the SIP;
- Communicate your **expectations**
 - Meaningful/Real work/projects (primary);
 - “Grunt” work (some allowed), make it clear to the student interns;
- **Supervisor** to monitor/guide
 - Keep a watchful eye on how the intern is adapting;
 - Provide ongoing feedback (informal – verbal comments will do) on student interns’ work performance;
 - Allow for progressively increasing work responsibilities/assigning more complicated tasks if considered appropriate; and
 - Prepare to coach/mentor the student interns on other non-job-specific career advice (if the supervisor is also the nominated mentor).



2.1 Role of PE (3)

Points to note

- **Intern = an full-time employee** (Guide for Employers paragraph 29)
 - terms and conditions of the employment are in **full compliance with all local legislation and statutory requirements** (e.g. Employment Ordinance, Minimum Wage Ordinance, Employees' Compensation Ordinance, MPF Schemes Ordinance, etc.).
 - any company policy violation should be handled in the same way as any other employee.
- Maintain **regular contact** and provide **timely update** with the HKSI Institute on (Guide for Employers paragraph 41 and 43):
 - any **changes to the employment status** of the interns as **exit interviews** with the interns will be conducted by the HKSI Institute if they fail to complete the internship in full;
 - **job-related performance issues** of the intern (e.g. attendance, punctuality, quality of work, etc.);
 - any **changes on the company's status** that may affect the eligibility of PEs to join the SIP; and
- PEs are required to read carefully and pay attention to the **consequences for non-compliance** of the programme (Guide for Employers paragraph 53 – 55).



2.2 Student Mentoring Programme “SMP” (1)

Guide for PEs paragraph 34 and Appendix 2

- Objective: **Gateway** for student interns to connect with experienced practitioners through **mentor-mentee relationships** so as to increase the interns’ understanding on career prospects and opportunities in the WAM industry
- Mentoring Term : internship duration
- Mentor nomination:
 - **Ideal ratio** of Mentor to Mentee is **1:1** though flexible up to 1:3
 - **Fill in Supervisor/Mentor information when reporting an offer in PE Admin Panel**, preferably before the commencement of internship
- Eligibility of Mentor:
 - an **experienced employee**, direct/non-direct supervisor of the intern, nominated from your organization, preferably with > 5 years of experience in the WAM sector; and
 - Interested/committed in **nurturing** young professionals
- Mentoring Arrangement
 - Frequency/Format of meetings and means of communication can be **mutually agreed**; and
 - both parties are encouraged to **meet in person at least once** during the mentoring term.



2.2 Student Mentoring Programme “SMP” (2)

- **Mentors are expected to**
 - understand and perform their role;
 - be readily approachable when mentees initiate mentoring sessions;
 - be open to share own professional experience and knowledge to facilitate mentees’ understanding of the WAM industry;
 - provide guidance on career-related issues raised by Mentees;
 - keep matters discussed confidential; and
- In the event of **discontinuation** during the mentoring term, the respective PE should:
 - nominate a **replacement Mentor** (subject to individual circumstances of each case, e.g. the remaining duration of the mentoring term); and
 - **notify** the HKSI Institute ASAP.



2.3 Workplace visit by the HKSI Institute

Guide for PEs paragraph 42

- Arranging **pulse check** with student interns or **workplace visits** (physical or online meetings) on a random basis as part of the control and monitoring procedures.
- Scope
 - Document verification on eligibility of students where applicable
 - Statutory compliance (on employment relationship with intern)
e.g. terms and conditions of employment contract (work hours/term duration/pay rate/termination clauses etc.), employees' compensation insurance certificate, etc.
 - Honorarium payment e.g. mechanism, record system
 - Attendance (in office/under WFH arrangement)
e.g. Clock-in/clock-out system, student on duty record, leave approval/record process
 - Work environment/Physical layout
 - Daily work assignments
- Format
 - On-site observation/online meetings
 - Direct dialogue with the interns
 - Validation with employer



3. Internship completion





3.1 Evaluation by PEs (1)

Guide for PEs paragraph 46 – 47

- Formal evaluation (in the prescribed assessment format) completed for:
 - 1. Performance assessment on the interns**
 - Include a **face-to-face discussion** between the supervisor (assessor) and intern for performance feedback on a 5-point scale (5 being the highest score) ;
 - both the assessor and interns to **sign** on the evaluation form; and
 - **endorsed** by authorised employer's representative.
 - 2. Overall operation of the SIP**
 - To be completed at least once a year by a representative of PE with considerable **direct involvement** in the SIP process.
 - Your feedback on our **service improvement** in aspects including programme calendar, support provided to PEs, process management, usefulness of the SIP, overall satisfaction rating and welcome any additional comments.
- Other **off-boarding** formalities in your organisation, e.g. Exit interviews/reference letters etc.



3.1 Evaluation by PEs (2)

- Performance Assessment on Interns



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Organiser: Financial Services and the Treasury Bureau of the HKSAR Government
執行伙伴：香港證券及投資學會
Implementation agent: Hong Kong Securities and Investment Institute

Asset and Wealth Management Sector

Performance Assessment on Intern

This performance assessment should be completed by the supervisor of the intern. The supervisor must discuss it with the intern to enable the latter to benefit from constructive feedback on his/her internship performance towards the end of the internship.

Information on Intern

Name (as printed on HKID card)	e.g. Chan Tai Man		
University or College		Year of Study	
Position Title			
Name of Participating Employer			
Internship Duration	from		to

Information on Supervisor

Name	
Position Title	

Date of Assessment	DD/MM/YYYY	Date of Discussion	DD/MM/YYYY
Original signature of Supervisor		Original signature of Intern	

Comments from Intern (if any)

Original signature by both the Assessor and Intern with date of assessment / discussion

Original signature of Authorised Person
For and on behalf of the Company

Company Chop

Date

Performance Assessment on Intern (cont'd)

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Updated in April 2025



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Implementation agent: Hong Kong Securities and Investment Institute

Please rate (☑) the intern's performance using the scale below. Rate N/A for not applicable or not enough information to form a judgement.

1	2	3	4	5
Far below expectations	Below expectations	Met expectations	Above expectations	Far above expectations

Assessment Criteria

Work Habits/Conduct

- Arrived punctually consistently and remained in office during working hours
- Informed supervisor if a specific commitment cannot be kept (e.g. absence/late for work, missed deadlines) and took the initiative to re-arrange work schedule
- Behaved appropriately regarding the norms about clothing, language, and manners at the workplace
- Upheld professional/business ethics, exhibited integrity and confidentiality attributes

Work Performance

- Undertook work assignments with enthusiasm
- Completed work assignments satisfactorily and timely
- Accepted responsibility for mistakes, made needed improvements and learnt from experiences
- Demonstrated proficiency in applying academic knowledge and relevant skills (e.g. computational/technical, verbal/written communication, critical reasoning, analytical, problem solving, innovating skills etc.) to accomplish work assignments
- Demonstrated personal character traits (e.g. self-motivation, resourcefulness, adaptability, judgement, assertiveness, etc.) in accomplishing work assignments

Workplace Interaction

- Showed respect to supervisor and actively sought supervision when necessary
- Responded well to constructive criticism
- Worked collaboratively with team members and fellow co-workers with a positive attitude

Overall Performance

Additional Comments if any

(e.g. What did the intern do exceptionally well? What areas could he/she improve on?)

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Updated in April 2025



3.1 Evaluation by PEs (3)

- Overall Operations of the SIP



Evaluation on the

The SIP Application Portal ("Portal") using the PE Admin Panel using information to form a judgement

1	2
Very Dissatisfied	Somewhat Dissatisfied

User System Experience

7. To what extent do you think the following aspects?

- (a) Submission of New Employer Application
- (b) Internship Position Management (job posting, amendments on job posting)
- (c) Receipt and Screening of Student Applications
- (d) Report Internship Offer(s) and Acceptance
- (e) Facilitate Upload and Review of Student Applications

Additional Comments
(e.g. Any major difficulties/constraints encountered)

8. Overall Satisfactory Level

Evaluator's Information
Name

Original signature of



Evaluation on the

Please rate (☑) the SIP using the scale below to form a judgement.

1	2
Very Dissatisfied	Somewhat Dissatisfied

Usefulness

4. Are you satisfied with the SIP?

- (a) meeting your expectations?
- (b) the number of applications received?
- (c) the quality of applicants?
- (d) recruiting the right student(s) for your company?
- (e) identifying talent pipeline for your company?

5. Overall Performance (Please rate)

Additional Comments

6. Will your company consider

☐ Yes ☐ No



Evaluation on the Student

Please rate (☑) the SIP using the scale below to form a judgement.

1	2
Very Dissatisfied	Somewhat Dissatisfied

Process Management

3. Are you satisfied with the following aspects?

- (a) Administrative formalities regarding the application / eligibility vetting process
- (b) Support on managing the company profile information posted on online application portal
- (c) Discretion exercised by employers on how recruitment/selection schedule
- (d) Follow-up on the recruitment process by HR
- (e) Liaison support rendered in arranging non-internship periods of the student for more (if applicable)
- (f) Employer briefing(s) prior to internship commencement
- (g) Arrangements of random pulse checks/ random visits on interns
- (h) Maintain regular communication with employers for status monitoring on interns during their placement
- (i) Action taken to handle complaints on student

Additional Comments
(e.g. Any major difficulties/constraints encountered)



Student Internship Programme Evaluation on the Student Internship Programme

To enable us to better execute the Student Internship Programme ("SIP"), your feedback is much appreciated. This evaluation should be completed by a member of the Participating Employer ("PE") who had considerable direct involvement in the SIP process.

Please rate (☑) the SIP using the scale below. Rate N/A for not applicable or not enough information to form a judgement.

1	2	3	4	5
Very Dissatisfied	Somewhat Dissatisfied	Neutral	Somewhat Satisfied	Very Satisfied

Student Internship Programme Calendar

1. Are you satisfied with the timing and/or duration of the following activities?

	1	2	3	4	5	N/A
(a) Submission of Employer Application and Internship Positions						
(b) Receipt of Student Applications						
(c) Timing of the Recruitment/Selection Process (Employers to determine their schedules in light of own business considerations after receipt of student applications)						
(d) Internship Placement (at least 1 month, reimbursable up to 3 months)						

Additional Comments
(e.g. Any major difficulties/constraints encountered in execution? Any improvement suggestions?)

Support for Participating Employers

2. Are you satisfied with the support rendered by the implementation team?

	1	2	3	4	5	N/A
(a) Clear communication on SIP features						
(b) Promptness in responding to enquiries						
(c) Quality of advice given						
(d) Timeliness in resolving issues						
(e) Professionalism in accommodating reasonable requests						

Additional Comments

PEs are required to provide feedback on the overall arrangement of the SIP at least once a year.



3.2 Evaluation by Interns

- On internship experience

- Assessment Criteria
 - On-boarding arrangements
e.g. pre-internship communication, orientation
 - On-the-job arrangements
e.g. roles/duties walkthrough, sufficient equipment provided, work environment familiarisation
 - Supervision arrangements
e.g. adequate guidance and feedback from supervisor, assigned with meaningful tasks
 - Student Mentoring Programme “SMP”
 - Overall Assessment on the SIP and Personal Reflections
e.g. meeting expectations, impact on career decisions
- HKSI Institute may share and follow up on the student interns’ comments with PEs where necessary.



3.3 Claims procedures - Claim rules

Guide for Employers paragraph 15 and 16:

- The HKSAR Government will subsidise the PE **up to 80% or HK\$8,000 (whichever is lower)** of the honorarium paid to the intern on a **on a monthly basis, up to a maximum of 3 months per financial year*, for each student intern**. For the avoidance of doubt, in case a student takes up more than one SIP position from different PEs within the same financial year, all involved PEs are respectively eligible for the subsidy of up to 3 months for that student intern within the same financial year*.
- The PE will be eligible to apply for the subsidy when the intern has attained **at least 80% of the contractual working hours / days on a monthly basis up to 3 months** as specified in the employment contract between the intern and the PE. The employment period of the intern may extend beyond the subsidised internship period, notwithstanding subsidy will not be provided for any internship beyond the approved subsidised period.

**Note: A financial year starts from 1 April and ends on 31 March of the following calendar year.*

Special arrangement in 2025/26:

**Cut-off for internship commencement: 31 October 2025; and
Cut-off for internship completion: 30 November 2025.**



3.3 Claims procedures - 60 calendar days calculation

Guide for Employers paragraph 48 - 52:

- Submit the **original** documents for subsidy claims **within 60 calendar days** after the completion of **each internship period** offered under the SIP.
- Late submission or those with insufficient postage will not be processed.

August						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
19	20	21	22	23	24	25
26	27	28	29	30	31	

→ Last intern day of last student intern

Special arrangement in 2025/26:
Any reimbursement applications submitted after 31 January 2026 will NOT be processed.

September						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

COB of the 60th day:
Deadline of claim application submission


October						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			



3.4 Documents for Claims – Required

A duly signed **Subsidy Claim Form** with original company chop is submitted with the following documents:

- Copy of duly signed **employment contract** or **offer letter** that certified all relevant employment details (please read the “[Points For Attention in Preparation of Employment Contract](#)” which can be downloaded from the WAM Pilot Programme website);
- Original **proof of attendance** with company chop stamped and signatures from the supervisor and the intern;
- Original **proof of payment of the honorarium** duly signed by the interns;
- Original of completed and signed **performance assessment forms** of the interns concerned

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執行伙伴：香港證券及投資學會
Implementation agent: Hong Kong Securities and Investment Institute

To : Hong Kong Securities and Investment (HKSI) Institute
17/F, Cambridge House, Taikoo Place, 979 King's Road, Quarry Bay, Hong Kong

**Student Internship Programme (“SIP”)
Asset and Wealth Management Sector**

SUBSIDY CLAIM FORM

Name of Participating Employer (Chinese) _____
(English) _____

Our company wishes to claim the subsidy from the Pilot Programme to Enhance Talent Training for the Asset and Wealth Management Sector on the monthly honorarium paid to the intern(s) recruited under “Student Internship Programme – Asset and Wealth Management Sector”. Relevant details of the intern(s) are listed on the following page(s). By completing and submitting this form,

1. We confirm the information provided in this form and all the supporting documents¹ for the respective intern(s) are true and correct; and
2. We declare we have not received and will not apply for any form of subsidy from any other funding schemes in respect of the honorarium paid to these intern(s).
3. We agree to the rejection of subsidy claim, termination of all or any part of the funding support, and claw back of any funding disbursed by the HKSAR Government and/or the HKSI Institute to our company in case of non-compliance with the terms and conditions under the SIP as well as the confirmation and declaration above.

Original signature of Authorised Person _____

Name of Authorised Person _____ Company Chop _____
For and on behalf of the Company

Position _____ Date _____

Telephone _____ Email _____

Note: The subsidy will be made by cheque payment in the name of the Participating Employer (“PE”) as stated above, or where necessary and appropriate, the hiring company from the same group company provided at the time of PE application, name of hiring firm (if applicable): _____

¹ Supporting documents for the intern(s), who completed verification process to satisfactory, refer to:
(a) copies of employment contract(s) of intern(s);
(b) completed attendance record(s) of intern(s);
(c) payment proof and/or receipt acknowledgement of the honorarium by intern(s);
(d) completed performance assessment(s) on intern(s) (with prescribed form prepared by Hong Kong Securities and Investment Institute)

1 Updated in April 2025

Information on all claim documents must be correct and consistent.



3.4 Documents for Claims

– Attendance Record (proof of attendance)



提升資產財富管理業人才培訓先導計劃
Pilot Programme to Enhance Talent Training for
the Asset and Wealth Management Sector

主辦單位：香港特別行政區政府財經事務及庫務局
Organiser: Financial Services and the Treasury Bureau of the HKSAR Government
執行伙伴：香港證券及投資學會
Implementation agent: Hong Kong Securities and Investment Institute

Student Internship Programme Asset and Wealth Management Sector

Attendance Record of Intern

Name of Participating Employer ("PE")	
Hiring Company (if any)	
Name of Intern & Position Title	Name of Supervisor & Position Title

Date (dd/mm/yy)	Weekday	Start Time	End Time	Actual Work Hours ⁵	Please <input type="checkbox"/> if WFH ⁶	Remarks for the workday (if any)
	Mon					
	Tue					
	Wed					
	Thu					
	Fri					
	Sat					
	Sun					
	Mon					
	Tue					
	Wed					
	Thu					
	Fri					
	Sat					
	Sun					
	Mon					
	Tue					
	Wed					
	Thu					
	Fri					
	Sat					
	Sun					

Original signature of both
the supervisor and intern
on every page with
company chop affixed

Signature of Supervisor⁷ Company Chop Signature of Intern⁷ Date

⁵ Meal breaks (paid or unpaid) are excluded from actual work hours.

⁶ Work-from-home (WFH) arrangement is acceptable at ONE day per week at maximum.

⁷ Supervisor and intern should sign on every page of the attendance record for endorsement.

- use template provided; or
- company system-generated attendance record:
 - bearing names and **signed off** by **the intern** and **his/her supervisor**;
 - add **remarks** for any early leaves or absence
- HKSI Institute will verify the actual hours worked against the contractual work hours as stated in signed employment contract or alternative documents.



3.4 Documents for Claims – Receipt Acknowledgement of Honorarium



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Receipt Acknowledgment of Honorarium by Intern

I, _____ (name of intern), was employed as an intern at
_____ (name of Participating Employer) from _____ (dd/mm/yyyy) to
_____ (dd/mm/yyyy).

* Please specify the hiring company if the contractual party is not the Participating Employer:

I hereby acknowledge receipt of my honorarium with breakdown as follows:

Period		Honorarium ⁴ (Amount Received) HK\$	Payment by Participating Employer or Hiring Company via Cheque/Autopay/Cash
From	To		
Total:			

☐ Please check (☒) the box to confirm that enrolment in the MPF Scheme has been completed by the Participating Employer for internship longer than 59 calendar days.

Original signature of Intern

Date

Original
signature of
the intern

⁴ Please include the 5% employee's contribution to the MPF Scheme, if any, to show the full amount of honorarium paid to the intern.

- For proof of payment to and receive by the intern;
- Use template provided; or
- Alternative : pay-slips/cheques
 - physically signed by intern confirming receipt of the honorarium;
 - information on the period applicable and the honorarium amount paid;
 - MPF deduction (employee's contribution) should be included or clearly indicated.



3.5 Calculation for subsidy claims of honorarium (1)

- Government subsidy **up to 80% or HK\$8,000 (whichever is lower)** of the monthly honorarium, capped at 3 months per student intern per financial year
- Condition : the interns must **attain 80% or more of the contractual working days/hours**
- Example (assuming 100% attendance of the student intern)

Internship not less than 1 month	Month	Start date	End date	Days	Subsidy on Honorarium Paid to Intern
	1st	2 Jun	1 Jul	30	80% of the pay during the period (i.e. 30 days in this example), capped at HK\$8,000
	2nd	2 Jul	1 Aug	31	80% of pay during the period (i.e. 31 days in this example) capped at HK\$8,000
	3rd	2 Aug	1 Sep	31	80% of pay during the period (i.e. 31 days in this example) capped at HK\$8,000
	4th	2 Sep	1 Oct	30	Non-subsidised period
	5th	Non-subsidised period

- Subsidy Cap will be calculated on a pro-rata basis if the internship duration is less than 3 months.



3.5 Calculation for subsidy claims of honorarium (2)

- What if the internship duration is >3 months?
 - Example for a 4-month internship (122 days) with total salary payment of HK\$40,000, at HK\$10,000 per month, assuming no leaves taken
 - Pro-rata calculation of the payment for 3 months
 - => $92^* \text{ days} / 122 \text{ days} \times \text{HK\$ } 40,000 = \text{HK\$ } 30,163.93$
 - 80% of honorarium (or HK\$8,000 whichever is lower) on a 3-month basis
 - => $80\% \times \text{HK\$ } 30,163.93 = \text{HK\$ } 24,131.14$
 - => Cap of HK\$8,000 per month or HK\$24,000 per 3-month
 - => Subsidy = HK\$24,000

* Notes: the number of days in a month counts from a start date to its prior date in the next month and may vary across different months applied.



Contact us

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