



# 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

1. Key updates and reminders
  - 1.1 Programme Quota Applied
  - 1.2 Student Eligibility Verification
  - 1.3 Report of Selected Student Interns and Internship Period
  - 1.4 Work-from-Home (“WFH”) Arrangement
2. Internship placement
  - 2.1 Role of Participating Employer (“PE”)
  - 2.2 Student Mentoring Programme (“SMP”)
  - 2.3 Workplace visit by the HKSI Institute
3. Internship Completion
  - 3.1 Evaluation by PEs
  - 3.2 Evaluation by Interns
  - 3.3 Claims procedures
  - 3.4 Documents for claims
  - 3.5 Calculation for subsidy claims of honorarium



# 1. Key Updates and Reminders





## 1.1 Programme Quota Applied

### Guide for PEs paragraph 7 – 10

- A **quota mechanism** on internship positions is introduced 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; and
  - number of internship positions requested.

<b>No. of full-time employees of the PE in Hong Kong</b>	<b>Maximum Quota for the PE</b>
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.
- PE may request **additional quotas** in writing with justification.
- Validity of quota allocated: **from the date of approval/renewal as a PE up to the next 31 March**. 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.



## 1.2 Student Eligibility Verification

### Guide for PEs paragraph 13, 28

- PEs are strongly recommended to verify students' eligibility **before extending any offers**. You are reminded to check if the students are:
  - **HKSAR resident**;
  - **full-time** undergraduate or postgraduate students in one of the 22 accredited degree-awarding [Higher Education Institutions](#) (“HEI”s) in Hong Kong; and
  - **lawfully employable** in the HKSAR.
- Documents are required for **permanent or non-permanent residents** in HKSAR
  - Hong Kong Identity Card; and
  - Student Identity Card / Official 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 which specify the student is a full-time students
- Additional documents are required for **non-permanent residents** in HKSAR
  - Any permit obtained to take up internship in designated period, e.g. “No Objection Letter” (“NOL”) or Immigration Arrangements for Non-local Graduates (“IANG”) visa issued by the Immigration Department;
  - Limit of stay (coincides with the entire internship period) on the passport remains unexpired; and
  - Endorsement letter from the HEI if the internship arranged outside summer period, i.e. 1 June – 31 August (both dates inclusive)



# 1.3 Report of Selected Student Interns and Internship Period

## PE Admin Panel

Home / Applicant

Filter:

Apply Date: From [ ] To [ ] Student: [ ]

Position: All [v] [ ]

University: [ ] [v] [ ]

Program: [ ] Degree Award Title: [ ]

Major: [ ] Year: All [v]

GPA >= [ ] Status: All [v]

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#	Applicant No. Position No. Position Hiring Company	Applied Date Eng. Name Chi. Name Contact Email	University Degree Award Title Major Year of study	
1	s21-30101 TestAX500 Admin Intern All New Co. Ltd	2021-03-04 17:32:04 Ivy Lam ivyiam@hksi.org	The Open University of Hong Kong Bachelor of Business Administration NA Penultimate year	<input type="button" value="View"/> <input type="button" value="Download CV"/> <input type="button" value="Cancel Accept"/>
2	s21-30103 TestWX500 Legal Intern All New Co. Ltd	2021-03-04 17:32:04 Ivy Lam ivyiam@hksi.org	The Open University of Hong Kong Bachelor of Business Administration NA Penultimate year	<input type="button" value="View"/> <input type="button" value="Download CV"/> <input type="button" value="Intend"/> <input type="button" value="Accept"/>

Status:  Intended  Accepted

## Guide for PEs paragraph 29, 34

- 1 Click the “**Accept**” button on the selected student intern.
- 2 Input employment period, progress and add remarks if necessary. Please note:
  - the internship start date should not fall on public holidays.
  - for final year students, the internship shall **commence before the expiry of student status**.
  - for non-local final year students, the internship arranged should be subject to the conditions of stay of their visa/entry permit issued by the Immigration Department.

Confirm to make offer

2

Internship start date: 2023-06-01 Internship end date: 2023-08-31

Progress:  Contract signed  Verbally accepted

Remarks: Apply annual leave on 1 July 2023 to 7 July 2023

Please be reminded to press "Submit" button to inform the final acceptance list to WAM Implementation Team.

- 3 Inform the HKSII Institute by clicking the “**Submit**” button (can submit the list more than once).



## 1.4 Work-From-Home (“WFH”) Arrangement

### Guide for PEs paragraph 39 – 40

- 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 for 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;
  - Who 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 companies** or **organisations** which have 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 30)
  - 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 42 and 44):
  - 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 54 – 56).



## 2.2 Student Mentoring Programme (1)

### Guide for PEs paragraph 35 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
  - **within one week** upon commencement of internship by completing the **Mentor-Mentee Match List** to the HKSI Institute
- 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 (2)

- **Mentors are expected to**
  - understand the role of Mentors;
  - 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 **discontinuing the SMP** through the entire 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 43

- 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
  - 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)

- 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 the one with considerable **direct involvement** in the SIP process.
    - Your feedback for our **service improvement** in the 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

**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: 香港特区政府财政事务局及库務局  
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 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.

**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		Date of Discussion	
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 Authorized Person For and on behalf of the Company	Company Chop	Date
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6 Updated in April 2024

**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: 香港特区政府财政事务局及库務局  
Organiser: Financial Services and the Treasury Bureau of the HKSAR Government

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Implementation agent: Hong Kong Securities and Investment Institute

### Performance Assessment on Intern (cont'd)

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	1	2	3	4	5	N/A
<b>Work Habits/Conduct</b>						
• 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						
<b>Work Performance</b>						
• 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						
<b>Workplace Interaction</b>						
• 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						
<b>Overall Performance</b>						

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

7 Updated in April 2024





# 3.1 Evaluation by PEs (3) - Overall Operations of the SIP

**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  
Organiser: Financial Services and the Treasury Bureau of the HKSAR Government  
執行伙伴:  
Implementation agent: Hong Kong Securities and Investment Institute

### Student Internship Programme Evaluation on the Student Internship Programme

To enable us to better execute the Student Internship Programme, your feedback is highly appreciated. This evaluation should be completed by a member of staff who had considerable direct involvement in the SIP process.

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

1	2	3
Very Dissatisfied	Somewhat Dissatisfied	Neutral

#### Student Internship Programme Calendar

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

(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) Recruitment/Selection Process of other student applications for any unfilled positions in the event where no suitable candidate is identified in (c) above (if applicable)	
(e) Internship Placement (at least 1 month, reimbursable up to 3 months)	

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

#### Support for Participating Employers

2. Are you satisfied with the support rendered by the intern's employer?

(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

**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:  
Implementation agent: Hong Kong Securities and Investment Institute

### Evaluation on the Student Internship Programme

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
Very Dissatisfied	Somewhat Dissatisfied	Neutral	Somewhat Satisfied

#### Process Management

	1	2	3
3. Are you satisfied with the following workflow/activities?			
(a) Administrative formalities regarding the application / eligibility vetting process			
(b) Support on managing the company profile and job information posted on online application portal			
(c) Discretion exercised by employers on how to pace the recruitment/selection schedule			
(d) Follow-up on the recruitment process by HKSI Institute			
(e) Arrangements to support further selection rounds by employers for unmatched/unfilled positions (if applicable)			
(f) Liaison support rendered in arranging non-overlapping internship periods of the student for more than one position (if applicable)			
(g) Employer briefing(s) prior to internship commencement			
(h) Arrangements of random pulse checks/ random workplace visits on interns			
(i) Maintain regular communication with employers regarding status monitoring on interns during their placement			
(j) Action taken to handle complaints on students (if applicable)			

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

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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:  
Implementation agent: Hong Kong Securities and Investment Institute

### Evaluation on the Student Internship Programme (cont'd)

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

#### Usefulness

	1	2	3	4	5	N/A
4. Are you satisfied with the SIP in the following areas?						
(a) meeting your expectations?						
(b) the number of applications received from students?						
(c) the quality of applicants?						
(d) recruiting the right student(s) for your internship position(s)?						
(e) identifying talent pipeline for your company?						

#### 5. Overall Performance (Please rate)

	1	2	3	4	5	N/A
Overall Performance						

Additional Comments

6. Will your company consider participating in the SIP in the future (if any)?  
 Yes  No

Evaluator's Information  
 Name \_\_\_\_\_ Position Title \_\_\_\_\_

Original signature of Evaluator \_\_\_\_\_ Company Chop \_\_\_\_\_ Date \_\_\_\_\_

Thank you for completing this evaluation.

<sup>1</sup> These are only indicative for the HKSI Institute's planning purpose. The HKSI Institute will approach potential employers formally for internship positions nearer the time.



## 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**
  - **Overall Assessment** on the SIP and Personal Reflections  
e.g. meeting expectations, impact on career decisions
- Sharing of consolidated evaluation results with employers



## 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.*





## 3.3 Claims procedures - 60 calendar days calculation

### Guide for Employers paragraph 49 - 53:

- 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

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 60<sup>th</sup> 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 **student identity documents** as a proof of student eligibility;
- Copy of **permit** obtained to take up internship in designated period (for non-permanent residents in Hong Kong);
- 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

**提升高素質管理人才培訓先導計劃**  
Pilot Programme to Enhance Talent Training for  
the Asset and Wealth Management Sector

主辦機構：香港證券及投資學院  
Organiser: Financial Services and the Treasury Bureau of the HKSAR Government  
執行機構：香港證券及投資學院  
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). We confirm that the information provided in this form and all the supporting documents<sup>1</sup> for the respective intern(s) are true and correct. We declare that 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).

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).

<sup>1</sup> Supporting documents refer to  
(a) student identity document(s) and work permit for non-local student(s) (details can be referenced to the guidance notes on Verification Process);  
(b) copies of employment contract(s) of intern(s);  
(c) completed attendance record(s) of intern(s);  
(d) payment proof and/or receipt acknowledgement of the honorarium by intern(s);  
(e) completed performance assessment(s) on intern(s) (with prescribed form prepared by Hong Kong Securities and Investment Institute)

**Information on all claim documents must be correct and consistent.**



## 3.4 Documents for Claims

### – Attendance record (proof of attendance)

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主辦單位：香港特区政府财政事务及康乐局  
Organiser: Financial Services and the Treasury Bureau of the HKSAR Government  
执行伙伴：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 <sup>4</sup>	Please ☑ if WFH <sup>5</sup>	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

Signature of Supervisor with Company Chop <sup>6</sup>	Signature of Intern <sup>6</sup>	Date
--	----------------------------------	------


<sup>4</sup> Meal break (paid or unpaid) are excluded from actual work hours.  
<sup>5</sup> Work-from-home (WFH) arrangement is acceptable at ONE day per week at maximum.  
<sup>6</sup> Supervisor and intern should ink-sign on every page of the attendance record.

5 Updated in April 2024

- 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 to verify against the actual hours worked against the contractual work hours as stated in employment contract/alternative documents.



## 3.4 Documents for Claims – Receipt of Honorarium

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the Asset and Wealth Management Sector

主辦單位: 香港特区政府财政事务及庫務局  
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**

**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 <sup>3</sup> (Amount Received) HK\$	Payment by Participating Employer or Hiring Company via Cheque/Autopay/Cash
From	To		
Total:			

Please check () the box if MPF Scheme has been enrolled in by the Participating Employer for internship longer than 59 calendar days.

Original signature of Intern \_\_\_\_\_ Date \_\_\_\_\_

**Original signature of the intern**

<sup>3</sup> Please include the 5% employee's contribution to the MPF Scheme, if any, to show the full amount of honorarium paid to the intern.

4 Updated in April 2024

- 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 added here.



## 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)

	Month	Start date	End date	Days	Subsidy on Honorarium Paid to Intern
Internship not less than 1 month	1st	3 Jun	2 Jul	30	80% of the pay during the period (i.e. 30 days in this example), capped at HK\$8,000
	2nd	3 Jul	2 Aug	31	80% of pay during the period (i.e. 31 days in this example) capped at HK\$8,000
	3rd	3 Aug	2 Sep	31	80% of pay during the period (i.e. 31 days in this example) capped at HK\$8,000
	4th	3 Sep	2 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
  - Pro-rata calculation of the payment for 3 months
    - =>  $92/122 \times \text{HK\$ } 40,000 = \text{HK\$ } 30,163.93$
  - 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





## Contact us

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Project Leader

Ivy Lam (ivylam@hksi.org)

Programme Manager

Johnny Hung (johnnyhung@hksi.org)

Email

[internship@wamtalent.org.hk](mailto:internship@wamtalent.org.hk)

Website

<http://www.wamtalent.org.hk>

Address

17/F, Cambridge House, Taikoo Place, 979 King's Road,  
Quarry Bay, Hong Kong

