**Consultation Questionnaire for the Hong Kong Financial Competency Framework**

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| **Background**The Investor Education Centre (IEC) has appointed the Hong Kong Institute of Education (HKIEd) to develop a Hong Kong Financial Competency Framework (FCF) for both children and adults*.* A financial competency framework describes essential competence elements that one needs to deal with everyday financial matters. These elements, knowledge, skills, attitudes, motivations and behaviours, are essential building blocks to make informed financial decisions. The FCF can be used to help develop education initiatives to improve the financial competency (literacy) of both school children and adults in Hong Kong or used to assess their financial literacy.**Purpose** This questionnaire seeks your views on the proposed FCF, particularly your opinions on the coverage of the financial competency elements in the context of Hong Kong. The information gathered from this questionnaire would provide direction for the project team to fine tune the proposed FCF, and to provide a ground for further studies. Details of the FCF and this questionnaire can be downloaded from [www.hkiec.hk/fcf](http://www.hkiec.hk/fcf). You are welcome to submit written comments on the proposed FCF by completing the questionnaire and returning it to HKIEd on or before **18 September** 2015 by e-mail, facsimile or post:By e-mail to: lauhm@ied.edu.hk or tamtw@ied.edu.hk                    By fax to: 2948 8321                           By mail to: D2-G-05, 10 Lo Ping Road, Tai Po, New Territories, Hong Kong                  |

All the given information will be kept strictly confidential. If you have any questions regarding this project, please contact Mr Stefan Lam at 2700 6009 or by e-mail at stefanlam@hkiec.hk.

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| **Respondent information**

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| I am responding: | as an individual | [ ]  *(Please tick the appropriate box)* |
|  | on behalf of an organisation |[ ]
| Name: | Click here to enter text. |
| Job Title: | Click here to enter text. |
| Organisation: | Click here to enter text. |
| Address: | Click here to enter text. |
|  | Click here to enter text. |
| Tel.: | Click here to enter text. |
| E-mail: | Click here to enter text. |

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| Please indicate your views on the following statements by ticking the appropriate boxes.1. **Do you agree with the following statements on the structure and content of the Proposed FCF?**

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| --- | --- | --- |
|  | Agree | Disagree |
| 1. The seven Knowledge and Skills Themes can cover all the relevant financial competences.
 |[ ] [ ]
| *Comments:*Click here to enter text. |
| 1. Using the four Key Stages of Learning (KS1-KS4) as the progression in the FCF for children is appropriate.
 |[ ] [ ]
| *Comments:*Click here to enter text. |
| 1. The knowledge and skills in the FCF for children are developed in a progressive manner.
 |[ ] [ ]
| *Comments:*Click here to enter text. |
| 1. Having Core and Extended competencies in the FCF for adults is appropriate.
 |[ ] [ ]
| *Comments:*Click here to enter text. |
| 1. The linkage of the content between the children and adults FCF is cohesive.
 |[ ] [ ]
| *Comments:*Click here to enter text. |
| 1. The length of the proposed FCF is appropriate.
 |[ ] [ ]
| *Comments:*Click here to enter text. |
| 1. The content in the proposed FCF is detailed enough.
 |[ ] [ ]
| *Comments:*Click here to enter text. |
| 1. The proposed FCF is easy to understand.
 |[ ] [ ]
| *Comments:*Click here to enter text. |  |

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| **B. Do you agree that the coverage in each of the following themes is appropriate?**  |
|  |  | Agree | Disagree |
| **Knowledge & skills** | **Money and banking** (MB) |[ ] [ ]
|  | *Comments:*Click here to enter text. |
|  | **Income and taxation** (IT) |[ ] [ ]
|  | *Comments:*Click here to enter text. |
|  | **Saving and investing** (SI) |[ ] [ ]
|  | *Comments:*Click here to enter text. |
|  | **Spending and credit** (SC) |[ ] [ ]
|  | *Comments:*Click here to enter text. |
|  | **Consumer rights and responsibilities** (CR) |[ ] [ ]
|  | *Comments:*Click here to enter text. |
|  | **Financial planning** (FP) |[ ] [ ]
|  | *Comments:*Click here to enter text. |
|  | **Protection and risk** (PR) |[ ] [ ]
|  | *Comments:*Click here to enter text. |
| **Attitudes** (A) |[ ] [ ]
| *Comments:*Click here to enter text. |
| **Motivations** (M) |[ ] [ ]
| *Comments:*Click here to enter text. |
| **Behaviours** (B) |[ ] [ ]
| *Comments:*Click here to enter text. |

1. **Further comments and opinion**

Please feel free to leave your valuable comment and opinion concerning the proposed FCF below:

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| Click here to enter text. |

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Thank you for your participation and support!