

Money Learning Directory FAQ

Account management

1. Who can contribute to the Money Learning Directory?

Currently, the Directory welcomes contributions from supporting organisations of the Financial Literacy Strategy 2019 only. If your organisation is interested to get involved in the Financial Literacy Strategy, please visit the IFEC website for details and contact us at flstrategy@ifec.org.hk.

2. What are the terms of use and obligation that the account user should follow?

Please refer to the Terms of Use uploaded on the Money Learning Directory webpage.

3. Is it allowed to register more than one account under the same organisation?

You can register more than one account under the same organisation if there are different units or teams at your organisation responsible for different financial education Initiatives. Each registered Directory account user shall own and manage its own submission of Initiatives information and the IFEC shall not in any way be accountable for the accuracy, reliability and timeliness of any Initiatives information submitted. The IFEC shall not merge different contents or different registered Directory accounts. Please note however that, the organisation name should be the same as our record of Financial Literacy Strategy 2019 Supporting Organisation.

If a registered Directory account is/is to be shared among different individuals, units or teams within your organisation, you are responsible for the security of the account information including the username and password.

You are advised to protect and store your username and password properly. As a security measure, your account will be temporarily disabled after eight invalid login attempts at our system.

4. What information will be required for account registration?

You need to provide details of your organisation and your contact (including a valid email address). One email address can only register for one account. Email address will be used for receiving system notification emails. Only email address with your organisation's domain is eligible to register an account. Hence, free email accounts such as Gmail or Yahoo are not eligible.

5. What is the required format for username and password?

Your username should be created in 6 to 30 characters. You may use a combination of numbers (0-9) and/or upper and lower case letters (A-Z, a-z). Space and other special characters will not be accepted.

Your password should be created in 8 to 30 characters. You may use a combination of at least one numbers (0-9) AND letters (A-Z, a-z). Space and other special characters will not be accepted.

6. What is the registration process?

The Investor and Financial Education Council (IFEC) who administer this Directory will review your registration after you submit the account registration form. Normally it will take five working days for processing but it may take longer if there is a need to request for additional information. If your registration is confirmed, an email with an activation link will be sent to you for activating your account. Please activate your account within 14 days.

7. What if I forget my password? Can I change my password?

You are advised to keep your account information including the username and password secure. You can click “Retrieve username and password” at the login page. You will receive an email to guide you to reset your password.

8. My account has been disabled after several invalid login attempts. How to re-activate my account?

As a security measure, your account will be temporarily disabled after eight invalid login attempts at our system. Please contact us at flstrategy@ifec.org.hk. Your identity will be verified before reactivating your account.

Initiatives information

9. What kind of initiatives are eligible for submission?

Only Initiatives that the IFEC determines in its sole discretion to have met the following criteria will be published in the Directory:

- Initiatives that contribute to the financial literacy of general public of Hong Kong;
- Initiatives that are available in English or Chinese or both (but description of Initiatives information need to be presented/submitted in both English and Traditional Chinese characters);
- Initiatives that are available to the Hong Kong audience for free or by paying a reasonable fee; and
- Initiatives that are already published or established;

10. What kind of initiatives are NOT eligible for submission?

- Initiatives that aim to promote the sales of products or services;
- Initiatives that are under development;
- Initiatives that target non-Hong Kong audience (but any such Initiatives which are adapted for a Hong Kong audience may be accepted);
- Initiatives information that contain inappropriate or irrelevant contents which include but are not limited to inappropriate language, misleading claims, contents which infringe third party intellectual property rights (such as copyright), political messages, etc;
- Initiatives submitted by registered Directory account users should be owned or controlled by the account users (or the organisations) who submitted the

Initiatives for listing on the Directory. The Directory may not accept Initiatives where the relevant account user is unable to prove ownership/control of the Initiatives to the satisfaction of the IFEC.

- Ad-hoc / irregular columns in media outlets (for example, a single or one-off newspaper column instead of a regular column dedicated to financial education subjects); or
- Individual entries of blog/ social media (blog/ social media platforms that are solely focused on financial education may be considered eligible Initiatives).

11. What is the time frame of eligible events?

You can input past and future initiatives. We will keep the data of past events for up to three years according to the event date.

12. What is the treatment of inappropriate content?

The IFEC is under no obligation to use the Initiatives information you submit. You shall provide accurate and up to date information and the IFEC is not in any way responsible for the accuracy, reliability and timeliness of any Initiatives information submitted by you (ie, the IFEC will not proofread submissions or generally check submissions received for errors).

The IFEC has the right in its sole discretion to modify, add or remove the Initiatives information for any reason at any time without notice, in particular for those information deemed inappropriate to be displayed.

13. What kind of topics does “financial literacy” include?

Financial literacy related topics include but are not limited to:

- Banking products / services
- Consumer/ investor rights and responsibilities
- Credit / debt / mortgage
- Financial disputes
- Financial markets and regulations
- Financial planning
- Financial risk and protection
- Insurance
- Investment
- MPF / retirement
- Saving / spending
- Scam prevention

Members of the general public can multi-select the topics to find financial education initiatives.

14. What is the requirement of the image for upload?

You can upload one image for one initiative. The image should be within 100KB file size having a ratio 4(W):6(H) and in jpg format.

15. What if the event is co-organised by several organisations?

You are advised to communicate between the organisations and to decide which organisation is responsible for submitting the entry. Duplicating submission by different organisations on the same initiative would cause confusion to the general public. You are also advised to have all the necessary rights and permissions to submit the initiatives information in advance.

Entry management

16. How can I create an entry for submission?

After you have logged in the entry management system, you can click the button at the top right to create a “resource” or “event”. You can then follow the information required to fill in the form.

17. Can I save my entry for later review?

Yes. You can press the “Save” button located in the submission form for future review. Please note that your entry has not been sent for review if you press the “Save” button. You can press the “Submit for approval” button if you have finished editing.

18. Can I create a copy of my entry for recurrence events?

Yes. At the entry management homepage, you can press the “Duplicate” button next to the entry you want for duplicating an entry.

19. Can I take down my entry from the website if it has been cancelled?

Yes. You can press the “Unpublish” button next to the entry, we will then process your request.

20. How long does the approval process take?

Normally it will take five working days for processing but it may take longer if there is a need to request for additional information.

21. Do I need to unpublish an event after the event date?

Unless the event has been cancelled, you do not have to unpublish an event. Our Money Learning Directory website will automatically display future events on the result column. The event occurred in the past will still be available for searching using the date range and it can be kept at the database as a record.