

PRE-REQUISITE / LISTS OF CHALLENGE STATUS

“E” - EXEMPTED

	Course 1	Course 2	Course 3	Course 4	Foundation Level ¹	Level 1	Level 2
	Education				Examination		
List A (Pre-requisite for CFP Certification)							
<ul style="list-style-type: none"> ■ Bachelor degree in all disciplines² ■ Financial Planning qualifications: <ul style="list-style-type: none"> - Associate of the Hong Kong Institute of Bankers (AHKIB); - Chartered Insurance Agency Manager (CIAM); - Chartered Wealth Manager (CWM); - Fellow, Australian and New Zealand Institute of Insurance and Finance (ANZIIF (Fellow)); - Fellow, Financial Services Institute (FFSI); - Fellow, Life Management Institute (FLMI); - Financial Advisers' International Qualification (FAIQ (CII)); - LUTCF Fellow (LUTCF); - Qualified Retirement Advisor (QRA) Holder; - Society of Registered Financial Planners (HKRFP) 							
List B							
<ul style="list-style-type: none"> ■ Financial Planning qualifications: <ul style="list-style-type: none"> - ASSOCIATE FINANCIAL PLANNER / AFP - Certified Financial Management Planner (CFMP); - Chartered Financial Consultant (ChFC); - Chartered Life Underwriter (CLU); - Fellow Chartered Financial Practitioner (FChFP); - Financial Risk Manager (FRM) 					E		
List C							
<ul style="list-style-type: none"> ■ Master Degree program in relevant discipline³ e.g. Economics / Business 	E	E	E		E		
List D							
<ul style="list-style-type: none"> ■ Associate / Fellow of Association of Chartered Certified Accountants (ACCA/FCCA); ■ Associate / Fellow of Association of International Accountants (AAIA/FAIA); ■ Associate / Fellow of Chartered Institute of Management Accountants (ACMA/FCMA); ■ Certified General Accountant (CGA); ■ Certified Management Accountant (CMA) (Australia, Canada & US); ■ Certified Public Accountant / Certified Practising Accountant (CPA/FCPA) (Australia, Hong Kong, US); ■ Chartered Accountant (CA) (Australia, Canada, England and Wales, Ireland, New Zealand, Scotland, South Africa, Zimbabwe); ■ Chartered Financial Analyst (CFA); ■ Fellow of Chartered Insurance Institute (FCII); ■ Fellow of the Society of Actuaries (FSA); ■ Members of Chartered Institute of Public Finance and Accountancy (CPFA); ■ Members of Hong Kong Bar Association; ■ Members of Hong Kong Law Society; ■ Doctoral Degrees in Economics / Business * 	E	E	E	E	E		

Individuals who qualify for Challenge Status are considered to have fulfilled the Education requirement through the self study mode.

¹ The *Foundation Level* examination paper also serves as the “Examination” element of the 4Es requirement for AFP™ certification. All terms relevant to the Foundation Level examination apply also to candidates/examinees for AFP Certification.

² The academic qualification must be awarded by accredited education institutes.

³ The academic qualification must be awarded by accredited education institutes. To apply for List C Challenge Status, the Master Degree program must substantially cover topics of the CFP Certification Education Program (course 1 to 3) in order to demonstrate the relevancy of discipline to the CFP Certification Education Requirements.