

## PRE-REQUISITE / LISTS OF "FAST-TRACK TO CFP CERTIFICATION"

"E" - EXEMPTED

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

Individuals who qualify for "Fast-track to CFP Certification" are considered to have fulfilled the Education requirement through the self study mode.

<sup>1</sup> 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.

<sup>2</sup> The academic qualification must be awarded by accredited education institutes.

<sup>3</sup> The academic qualification must be awarded by accredited education institutes. To apply for List C "Fast-track to CFP Certification", 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.

<sup>4</sup> "Fast-track to CFP Certification" formerly known as the "Challenge Status".