

LISTS OF “FAST-TRACK TO CFP CERTIFICATION”

Abridged version for candidates of AFP Certification

Individuals with qualifications listed below (“Fast-track to CFP Certification” List A to D) are exempted from the 120-hour AFP Certification Education Program.

Individuals qualify for “Fast-track to CFP Certification” are considered as fulfilling the Education requirement through the self study mode.

List A
<ul style="list-style-type: none"> ■ Bachelor degree in all disciplines¹ ■ 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"> - Certified Financial Management Planner (CFMP); - Chartered Financial Consultant (ChFC); - Chartered Life Underwriter (CLU); - Fellow Chartered Financial Practitioner (FChFP); - Financial Risk Manager (FRM)
List C
<ul style="list-style-type: none"> ■ Master Degree program in relevant discipline² e.g. Economics / Business
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 *

Note to individuals with more than one qualification under the “Fast-track to CFP Certification” List:

- In the context of AFP Certification, the exemption granted to individuals from List A to D equals. Each list, however, allows different level of exemption in the context of CFP Certification. Individuals with intention to progress to CFP Certification should refer to information about CFP Certification.

¹ The academic qualification must be awarded by accredited education institutes.

² 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.

³ “Fast-track to CFP Certification” formerly known as the “Challenge Status”.