



# CFP® CERTIFICATION EXAMINATION

## CFP®資格認證考試

**Entry Requirements** (have to fulfil the following membership, education and examination requirements)

**報考資格** (需符合以下的會籍、教育及考試要求)

### CFP Certification Examination (Foundation Level)

#### CFP 資格認證考試 (基礎階段)

|                   |   |
|-------------------|---|
| Membership<br>會籍  | <input checked="" type="checkbox"/> Hold a valid candidacy status for 2025.<br>持有 2025 年度的候證人身份。  |
| Education<br>教育要求 | <input checked="" type="checkbox"/> Have completed [Note (1)] or have been granted exemption from the AFP® Certification Education Program.<br>已完成 [備註 (1)] 或獲豁免完成 AFP®資格認證教育課程。<br>[(1) fulfilled the 70% attendance requirement of the Education Program 指達到教育課程 70%出席率的要求] |

### CFP Certification Examination (Advanced Level Paper 1)

#### CFP 資格認證考試 (高級階段卷一)

|                     |   |
|---------------------|---|
| Membership<br>會籍    | <input checked="" type="checkbox"/> Hold a valid AFP® certificant status for 2025, or a valid candidacy status (under Fast-track to CFP Certification – List A / B / C / D) for 2025.<br>持有 2025 年度的 AFP®持證人身份，或 2025 年度的「通向 CFP®資格認證的快速通道*」列表 A/B/C/D 候證人身份。   |
| Examination<br>考試要求 | <input checked="" type="checkbox"/> Have completed or have been granted exemption from the CFP Certification Examination (Foundation Level).<br>已通過或獲豁免完成 CFP 資格認證考試 (基礎階段)。  |
| Education<br>教育要求   | <input checked="" type="checkbox"/> Have completed [Note (2)] or have been granted exemption from the CFP Certification Education Program Course 1, Course 2 and Course 3.<br>已完成 [備註 (2)] 或獲豁免完成 CFP 資格認證教育課程 (課程一、課程二及課程三)。<br>[(2) had an attendance rate of not less than 70% in each course 指課程一至三各課程的出席率均不少於 70%] |

### CFP Certification Examination (Advanced Level Paper 2)

#### CFP 資格認證考試 (高級階段卷二)

|                     |  |
|---------------------|--|
| Membership<br>會籍    | <input checked="" type="checkbox"/> Hold a valid AFP® certificant status for 2025, or a valid candidacy status (under Fast-track to CFP Certification – List A / B / C / D) for 2025.<br>持有 2025 年度的 AFP®持證人身份，或 2025 年度的「通向 CFP 資格認證的快速通道*」列表 A/B/C/D 候證人身份。  |
| Examination<br>考試要求 | <input checked="" type="checkbox"/> Have completed or have been granted exemption from the CFP Certification Examination (Foundation Level).<br>已通過或獲豁免完成 CFP 資格認證考試 (基礎階段)。   |
| Education<br>教育要求   | <input checked="" type="checkbox"/> Have completed [Note (3)] or have been granted exemption from the CFP Certification Education Program Course 1, Course 2, Course 3 and Course 4.<br>已完成 [備註 (3)] 或獲豁免完成 CFP 資格認證教育課程 (課程一、課程二、課程三及課程四)。<br>[(3) had an attendance rate of not less than 70% in each course and attained at least 50% of the final marks in Course 4 指課程一至四各課程的出席率均不少於 70%，以及課程四的總分不少於 50%] |



香港財務策劃師學會  
INSTITUTE OF FINANCIAL PLANNERS OF HONG KONG

13/F, Causeway Bay Plaza 2, 463-483 Lockhart Road, Hong Kong 香港銅鑼灣駱克道463-483號銅鑼灣廣場二期13樓  
T : (852) 2982 7888 F : (852) 2982 7777 W : www.ifphk.org E : info@ifphk.org



# CFP® CERTIFICATION EXAMINATION

## CFP®資格認證考試

### Application Procedures

#### 申請程序

- Step 1 第一步** ➤ Register as an IFPHK candidate (please click [here](#) for the candidacy registration form).  
註冊成為香港財務策劃師學會候選人（請[按此](#)下載候選人身份註冊表格）。
- Step 2 第二步** ➤ Fulfill the pre-requisite Education and Examination requirements of the level of examination you wish to enrol. It is the sole responsibility of candidates to ensure that they meet all the prerequisite and eligibility requirements prior to applying for the examination. IFPHK does not assume responsibility towards or accept liability to a candidate's eligibility to sit the examination. Candidates must submit the required supporting academic records (attendance certificate or assessment result) together with the application forms, or at the latest within FIVE DAYS after the examination..  
就欲報考的階段考試，完成所需的先修教育及考試要求。考生有責任在申請考試前確保已符合所有必要條件及資格要求。對考生的考試資格，學會概不承擔任何責任或義務。考生必須連同申請表格一併提交所需的學術證明文件（出席證書或評估結果），或最遲於考試日後 5 天內提交。
- Step 3 第三步** ➤ Enrol the correct level of CFP Certification Examination (please click [here](#) to go to "Member's Login" to register online during the application period).  
報考正確階段的 CFP 資格認證考試（請在報名期內[按此](#)前往「會員專區」經網上報考）。

|                            | Foundation Level<br>基礎階段                                 | Advanced Level Paper 1 and Paper 2<br>高級階段卷一及卷二   |
|----------------------------|--|---|
| Exam Date<br>考試日期          | 13 December 2025 (Saturday)<br>2025 年 12 月 13 日（星期六）     |   |
| Application Period<br>報名日期 | 29 August – 3 November 2025<br>2025 年 8 月 29 日至 11 月 3 日 |   |
| Application Form<br>報名表格   | <a href="#">Bilingual</a><br><a href="#">中英對照</a>        | <a href="#">Bilingual</a><br><a href="#">中英對照</a> |

### Download

#### 下載

|                              | Foundation Level / Advanced Level Paper 1 and Paper 2<br>基礎階段／高級階段卷一及卷二 |   |
|------------------------------|---|---|
| Examination Handbook<br>考試手冊 | <a href="#">English Version</a><br><a href="#">英文版本</a>                 | <a href="#">Chinese Version</a><br><a href="#">中文版本</a> |
| Helpful Tips<br>考試提示         | <a href="#">Bilingual</a><br><a href="#">中英對照</a>                       |   |
| Sample Questions<br>試題樣本     | <a href="#">English Version</a><br><a href="#">英文版本</a>                 | <a href="#">Chinese Version</a><br><a href="#">中文版本</a> |



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T : (852) 2982 7888 F : (852) 2982 7777 W : [www.ifphk.org](http://www.ifphk.org) E : [info@ifphk.org](mailto:info@ifphk.org)