

**INSTITUTE OF FINANCIAL PLANNERS OF HONG KONG**  
**Application for Concessionary Fee Arrangements for Candidacy with Challenge Status (List A)**  
**(for Local Full-time Undergraduate Students)**

Points to Note:

**1 Candidacy with Challenge Status (List A)**

- 1.1 Individuals with a bachelor degree awarded by an accredited institution may apply for candidacy with challenge status (List A). Upon approval, they may apply for taking the CFP Certification Examination (Foundation Level).

After passing the CFP Certification Examination (Foundation Level), if they possess one year of qualified work experience and agree to abide by the IFPHK's Code of Ethics and Professional Responsibility, they may apply to become an AFP Certificant. Alternatively, they may maintain a valid candidacy status. With a valid AFP certificant or candidacy status they may proceed towards CFP certification.

- 1.2 Students who are taking a bachelor degree program may apply for challenge status (List A) candidacy. Conditional approval may be granted by IFPHK. Upon conditional approval, they may apply for taking the CFP Certification Examination (Foundation Level) (even prior to completion of the bachelor degree program).

- 1.3 Students with conditional approval must submit their transcript / certificate to IFPHK within six month after completion of the bachelor degree program. IFPHK will then change their status from "conditional approval" to "approved".

The passing of the CFP Certification Examination (Foundation Level) will only be accepted by IFPHK as valid for meeting the examination requirement for AFP certification after it has provided "approved" status for the candidacy with challenge status (List A).

- 1.4 For students who cannot complete the bachelor degree program, or fail to submit transcript / certificate to IFPHK within six months after completion of the bachelor degree program, the CFP Certification Examination (Foundation Level) result will be nullified.

**2 Standard Fee**

- 2.1 To apply for candidacy with challenge status (List A), normally an applicant needs to pay

- application fee (HK\$300)
- challenge status assessment fee (HK\$1,000)
- candidacy annual fee (HK\$500 per year)

**3 Concessionary Fee**

- 3.1 From 2013, IFPHK offers concessionary fee arrangements for Hong Kong students (please see 3.2 for details). Under the arrangements, the challenge status assessment fee is reduced to HK\$500. The candidacy annual fee is waived until 31 December of the year of completion of the bachelor degree program.

- 3.2 Only **BONA FIDE** full-time students who are taking up a face-to-face undergraduate degree program in any discipline at one of the following Hong Kong institutions\*\* are eligible to apply for the concessionary fee arrangements.

- Caritas Institute of Higher Education
- Centennial College
- Chu Hai College of Higher Education
- City University of Hong Kong
- Hang Seng Management College
- Hong Kong Academy for Performing Arts
- Hong Kong Baptist University
- Hong Kong Shue Yan University
- Lingnan University
- Technological and Higher Education Institute of Hong Kong, Vocational Training Council
- The Chinese University of Hong Kong
- The Hong Kong Institute of Education
- The Hong Kong Polytechnic University
- The Hong Kong University of Science and Technology
- The Open University of Hong Kong
- The University of Hong Kong
- Tung Wah College

\*\* Based on Education Bureau's records of Hong Kong degree-awarding higher education institutions

- 3.3 Students who do not qualify for the concessionary fee arrangements will have to pay the Standard Fee when applying for candidacy with challenge status (List A).

**4 Application**

- 4.1 Application for concessionary fee arrangements **MUST** be submitted together with the candidacy application form at the time of candidacy application.

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**Part A Personal Information**

Name in English: \_\_\_\_\_

Name in Chinese: \_\_\_\_\_ Contact Tel No.: \_\_\_\_\_

Email: \_\_\_\_\_

**Part B Information on Course of Study**

Student ID No.: \_\_\_\_\_ Year of Study in 2017/18: \_\_\_\_\_

Institution: \_\_\_\_\_

Course/Program Name: \_\_\_\_\_

Course/Program Duration: \_\_\_\_\_ Years Expected Graduation Date (MM/YYYY): \_\_\_\_\_

**Part C Checklist**

Please put a "✓" in the appropriate box(es)

- The Candidacy Application Form has been completed and is attached.
- A copy of my student ID is attached.

If your student ID does not contain information to prove the study mode (full-time studies) and study level (degree level), please attach a copy of your admission letter / examination results slip with the said information as supporting document.

- A copy of my admission letter / examination results slip is attached.

**Part D Declaration and Signature**

I declare that the above information is true and complete. I want to apply for candidacy with challenge status (List A) and concessionary fee arrangements.

I understand that if my application is approved,

1. I only need to pay an application fee (HK\$300) and a discounted assessment fee (HK\$500);
2. I may apply and sit for CFP Certification Examination (Foundation Level) prior to completion of the bachelor degree program;
3. I have to submit proof of completion of the bachelor degree program to the IFPHK within six months after completion of the bachelor degree program;
4. The passing of the CFP Certification Examination (Foundation Level) will only be accepted by IFPHK as valid for meeting the examination requirement for AFP certification after it has provided "approved" status for the candidacy with challenge status (List A); and
5. The CFP Certification Examination (Foundation Level) result will be nullified if I cannot complete the bachelor degree program, or I fail to submit my transcript / certificate to IFPHK within six months after completion of the bachelor degree program.

I hereby consent to the IFPHK using the personal data provided in this application form for

- i. processing my application for candidacy with challenge status (List A) and concessionary fee arrangements;
- ii. administration and maintenance of my candidacy records; and
- iii. statistics and research purposes.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_