

## APPENDIX 4: EXEMPTION TRACK

Applicants with the following experience, academic or professional qualifications may qualify for the Exemption Track and be exempted from classroom training on Topic 1 to 3 (16 hours) or the QRA Education Program:

- Three years full-time financial services industry experience; OR
- Bachelor Degree or above from accredited education institutions; OR
- Any one of the following professional qualifications:
  - Financial Advisers' International Qualification
  - 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)
  - LUTCF Fellow (LUTCF)
  - Society of Registered Financial Planners (HKRFP)
  - ASSOCIATE FINANCIAL PLANNER™ / AFP™ Certification
  - Certified Financial Management Planner (CFMP)
  - Chartered Financial Consultant (ChFC)
  - Chartered Life Underwriter (CLU)
  - Fellow Chartered Financial Practitioner (FChFP)
  - Financial Risk Manager (FRM)
  - 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