



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

CFP[®] CERTIFICATION PATHWAY

Plan Smarter **Thrive Globally**



CFP CERTIFICATION

The CERTIFIED FINANCIAL PLANNER® certification or the CFP certification is the world's oldest and most-recognized advanced certification for financial planners.

The rigorous certification process ensures that all CFP professionals are committed to providing competent and ethical financial planning services to clients.

As at 2026, there are more than 236,000 CFP certificants in 29 countries/regions; the majority of these professionals are in the U.S., China, Japan, Canada and Brazil, with about 3,238 CFP certificants in Hong Kong.

**CFP PROFESSIONALS
WORLDWIDE**

236,300

GROWTH RATE

2.5%

**INCREASE OVER
Previous Year**

5,652

TERRITORIES

29

2025 year-end figures



ABOUT IFPHK

IFPHK was established in June 2000 as a non-profit organization for the fast-growing financial industry. It aims to be recognized in the region as the premier professional body representing financial planners that uphold the highest standards to benefit the public.

The Institute is the sole licensing body in Hong Kong authorized by Financial Planning Standards Board Limited to grant the much-coveted and internationally-recognized CFP certification and AFP® certification to qualified financial planning professionals in Hong Kong and Macau.

WHY OPT FOR CFP CERTIFICATION?

Global Gold Standard

Acknowledged as the global gold standard in the financial planning profession, representing the highest standards of ethics, knowledge, and professionalism.

Holistic Expertise

The program covers investment, retirement, estate planning, taxation, and insurance, enabling CFP certificants to provide clients with comprehensive and robust financial strategies.

International Acclaim

CFP certification is globally recognized and esteemed, with IFPHK serving as the exclusive certifying body in Hong Kong and Macau.

High Earning Potential¹

1M

36.5% of the surveyed CFP certificants earn over HKD 1 million annually. 8.8% earn over HKD 2 million annually.

Highly Regarded by Client²

93%

Clients trust CFP certificants to act in their best interests.

75%

Clients say that their financial planner has made them tangibly better off.

90%

Clients feel financially secure.

1. 2025 - 26 IFPHK survey among renewed CFP certificants

2. 2023 FPSB global consumer survey on the value of financial planning



TESTIMONIALS FROM INDUSTRY LEADERS



The CFP certification is the golden standard for financial planning and wealth management professionals. It reflects the knowledge and experience to provide competent and professional financial services to clients in Hong Kong.

Professor Louis Cheng
Honorary Member,
IFPHK



CFP certification represents the gold standard in financial planning. It's not just a mark of technical excellence, but a commitment to serving clients with insight, care, and integrity. Being a CFP professional is about seeing the whole picture of our clients' lives and helping them plan with confidence and purpose.

Mr. Steve Chiu
Honorary Member,
IFPHK



"The CFP certification provides me with a distinct blend of practical expertise and esteemed recognition. It significantly elevates my professionalism and enhances the perception my clients have of our services."

Mr. Tony Mak
Honorary Member,
IFPHK



"The CFP certification equips individuals with rigorous professional training, enabling impartial and expertly crafted financial planning advice that prioritizes clients' best interests."

Mr. Paul Pong
Honorary Member,
IFPHK



CFP certification is a highly respected qualification and has raised the professionalism of financial planning. It has greatly improved the image of the whole industry and increased clients' trust of planners."

Mr. Samuel Yung, GBS, MH, JP
Honorary Member,
IFPHK

THE CERTIFICATION PROCESS



01

Find your pathway and register as a candidate member



02

Complete the education program and pass the examinations



03

Gain relevant industry experience



04

Submit your application to IFPHK for CFP certification and adhere to ethical standards and professional responsibility

4

CERTIFICATION REQUIREMENTS



Education

Complete a recognized education program



Experience

Acquire relevant industry experience



Examination

Pass three examinations



Ethics

Commit to adhering to the highest ethical standards and professional responsibility

2

CERTIFICATION PATHWAYS



Academic Pathway

Tailored for individuals pursuing certification through their highest academic qualifications



Qualification Pathway

Designed for practitioners holding recognized credentials, further divided into two subcategories:

- Industry Qualifications
- Professional Qualifications

TWO CERTIFICATION PATHWAYS

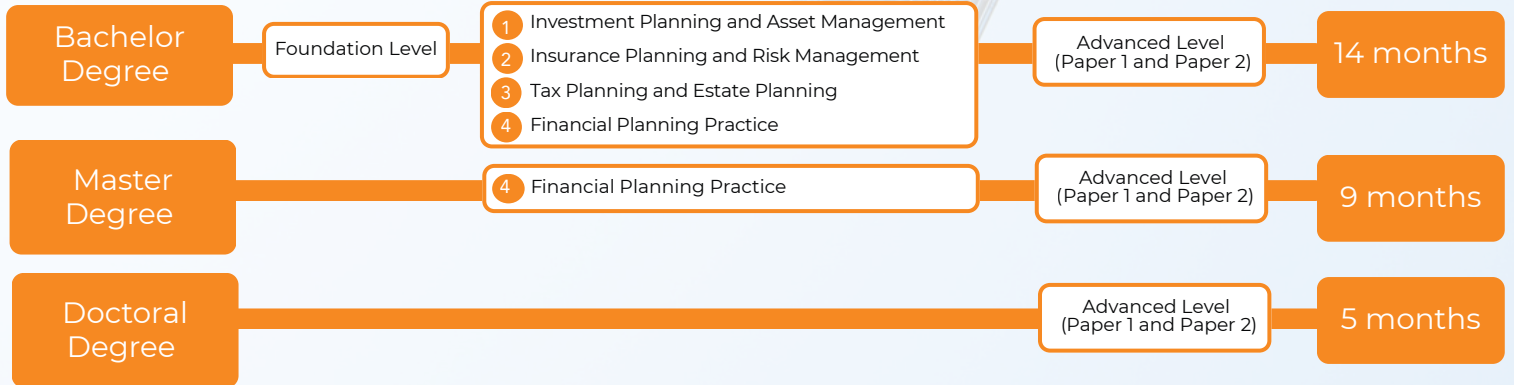
EXAMINATION
REQUIREMENTS

EDUCATION
REQUIREMENTS

EXAMINATION
REQUIREMENTS

EXPECTED
TIME OF
COMPLETION

Academic Pathway



Qualification Pathway

Professional Qualification



Industry Qualification



Both pathways provide a rigorous yet flexible and expedited route to CFP certification.

REGULATORY RECOGNITION

Hong Kong

CFP certification is recognised by Hong Kong financial regulators as a relevant professional qualification. The SFC Guidelines on Competence allow recognised industry qualifications such as CFP certification to help meet certain licensing or competence requirements. Any exemption is case-by-case. The Insurance Authority (IA) may give credit for CFP certification towards its examination or CPD requirements, subject to its rules*. This shows the strong standing of CFP professionals in Hong Kong's financial industry.

Mainland China

Major cities such as Shanghai and Shenzhen run high-level talent programmes that can offer tax or career incentives. CFP certificants may be considered, but must meet each city's local criteria for high-end or in-demand talent.*

Macau

CFP certification is officially recognised in Macau's financial services sector. Holders may also be eligible for various government funding or subsidy schemes, provided they satisfy the relevant programme criteria.*

*Any regulatory recognition, funding or incentive is not automatic and depends on the current rules and eligibility criteria set by the SFC, IA, Macau authorities and Mainland city or provincial governments. Policies may change; please check the latest official information.


START YOUR JOURNEY TOWARDS GLOBAL RECOGNITION TODAY!



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