

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) of 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 (FAIQ)
 - Associate of the Hong Kong Institute of Bankers (AHKIB);
 - Associate Retail Wealth Professional (ARWP);
 - 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
 - Certified Financial Management Planner (CFMP);
 - Chartered Financial Consultant (ChFC);
 - Chartered Life Underwriter (CLU);
 - Certified Retail Wealth Professional (CRWP);
 - 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;