

IFPHK Candidacy Renewal Policy

1. All individuals are required to maintain a valid candidacy status with IFPHK during the AFP® certification process / CFP® certification process (when taking the education program / examination and when applying for certification).

Renewal Period

2. A candidacy year runs from 1 January to 31 December. To renew the candidacy status, candidates must submit their renewal applications with appropriate fees to IFPHK by 31 December each year.

Late Application and Late Fee

3. On or before 31 January in the following year, candidates who miss the renewal deadline of 31 December can still apply for renewal without seeking reinstatement by paying a late fee (please refer to the fees table for latest information).

Reinstatement

4. Candidates who have lapsed their candidacy may reinstate their candidacy under the following terms and conditions:
 - Payment of HK\$500 reinstatement fee per year
 - Payment of annual candidacy fee at HK\$500
 - Completion of the Reinstatement Form

IFPHK 候證人身份續期政策

1. 所有人必須在修讀／考取／申請 AFP®資格認證／CFP®資格認證的過程中，於香港財務策劃師學會（下稱“學會”）持有有效的候證人身份。

續期日

2. 候證人身份的有效期以西曆計算，由 1 月 1 日起至 12 月 31 日止。要為候證人身份續期，候證人必須在每年的 12 月 31 日或以前向學會遞交續期申請以及繳付續期費用。

逾期申請及費用

3. 候證人如未能於 12 月 31 日的限期或以前遞交續期申請，他們仍可於次年的 1 月 31 日前遞交續期申請而無須尋求恢復候證人身份，但需繳付過期遞交續期申請費用（有關最新之費用，請參閱費用表）。

恢復候證人身份

4. 候證人身份已失效的人士如需恢復其候證人身份，須遵循以下的條款及細則：
 - 支付每年港幣 500 元的恢復候證人身份手續費
 - 支付港幣 500 元的候證人年費
 - 填妥恢復候證人身份的申請表格