



For office use only

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Batch no.

HKXM-CFMP
(2007)

Exemption Application Form (CFMP™ Examination – Subject Exemption)

- Please complete the form in **BLOCK LETTERS**.

SECTION A: PERSONAL PARTICULARS		
Title <input type="checkbox"/> Dr <input type="checkbox"/> Mr <input type="checkbox"/> Ms <input type="checkbox"/> Mrs <input type="checkbox"/> Other (please specify)	HKIB Membership no.	
Surname	Given Name	
HKID/Passport no.	Mobile	
Current Employer		
Department	Position	
Correspondence Address <input type="checkbox"/> Business <input type="checkbox"/> Residential		
Telephone no.	Fax no.	E-mail
ACADEMIC/PROFESSIONAL QUALIFICATION (HIGHEST QUALIFICATION ONLY)		
Year of completion	Qualification obtained	School/College/Professional Institution/University

SECTION B: APPLICATION FOR EXEMPTION			
Please put ✓ on the subjects which you would like to apply for exemption.			
Stages	Modules	Please ✓	For office use only
Stage One	Regulatory Environment for Banking and Financial Planning	<input type="checkbox"/>	
	Investment Products and Markets	<input type="checkbox"/>	
	Essentials of Banking and Financial Planning	<input type="checkbox"/>	
Stage Two	Insurance and Retirement Planning	<input type="checkbox"/>	
	Tax and Estate Planning	<input type="checkbox"/>	
	Fund and Asset Management	<input type="checkbox"/>	
Total subject(s) applied (please circle) 1 2 3 4 5 6 7			

CHECKLIST
<input type="checkbox"/> Completed all sections of this form
<input type="checkbox"/> Enclosed exemption fees (cheque or filled in the credit card mail order payment instructions)
<input type="checkbox"/> Enclosed certified true copies of your certificate(s) and official transcripts
<input type="checkbox"/> Enclosed course outlines, question papers of relevant courses, samples of assignment/course work, etc

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Assessed by	Amount
Entry Date	Send on
Remarks	

FEES SCHEDULE		PAYMENT METHOD	
Application Fee * (per form)	HK\$200	<input type="checkbox"/> Cheque (made payable to "THE HONG KONG INSTITUTE OF BANKERS")	
Exemption Fee # (per subject)	HK\$600	Please use separate cheques for Application Fee and Subject Exemption Fees (use separate cheque for each subject)	
Transfer Exemption Fee	HK\$1,500	<input type="checkbox"/> Credit Card	
Exemption Fee for Comparable Qualifications	HK\$1,000	<input type="checkbox"/> Visa <input type="checkbox"/> Master Amount \$ _____	
* Application fee is non-refundable		Name of Cardholder _____	
# Exemption fee will not be charged if the application is unsuccessful		Credit card no. _____ - _____ - _____ - _____	
		Expiry Date ____ / ____ Signature _____	
		Please fill in the total amount of your Application Fee and Subject Exemption Fee	

- NOTES FOR EXEMPTION**
1. To apply for exemption, the applicant should be a current member of The Hong Kong Institute of Bankers.
 2. The applicant should submit all relevant documentary evidence for his/her qualifications (i.e. certificates, official transcripts etc) together with this form. Only **certified true copies** of the documents are accepted. We only accept photocopies of the documents which are certified as true copies by:
 - (i) Liaison Officer (District Offices), Home Affairs Department of the HKSAR; or
 - (ii) The Hong Kong Institute of Bankers.
 3. Applicants with Comparable Qualifications may sit the Module 7 (Financial Planning and Management) only, subject to case-by-case basis.
 4. Applicants with Diploma Program in Financial Planning or equivalent may apply for transfer exemption, subject to case-by-case basis.
 5. A maximum of 4 subject exemption is allowed for recognized examinations/qualifications, unless otherwise specified.
 6. The application fee of HK\$200 is non-refundable.
 7. Only successful application will be charged for exemption fees.
 8. The application result will normally be sent to the applicant within two months of the application.
 9. All documents submitted will not be returned regardless of the result of the application.
 10. The Institute reserves its right to refuse application for exemption if deemed appropriate.

ACKNOWLEDGEMENT AND DECLARATION

I, the undersigned, hereby make application for the exemption of the CFMP Examination offered by The Hong Kong Institute of Bankers. I declare that the information given in this form is true and accurate.

I fully understand that the application fee (HK\$200) for this application is non-refundable.

I confirm that I have read the Institute's Examination Handbook and Notes for Exemption printed in this form and fully understand the rules and regulations.

Signature _____ Date _____

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