

For Pre-approved Qualification Holders Only

- Please read the **NOTES** carefully before completing this form.
- Please complete the form in **BLOCK LETTERS**.
- Please tick or delete as appropriate

For office use only

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Batch no.

HKXM-CFMP-HK
(2017)

Certified Financial Management Planner (CFMP™) – Hong Kong Subject Exemption Application Form

SECTION A: PERSONAL PARTICULARSTitle Mr Ms Mrs Dr Other (please specify)

HKIB Membership No.

Name (as shown on HKID/Passport) (Surname)

(Given Name)

HKID/Passport No.

Current Employer, if applicable

Department

Position

Correspondence Address Business Residential

Telephone / Mobile no.

E-mail

ACADEMIC/PROFESSIONAL QUALIFICATION

Year of Graduation	Highest Qualification Obtained	Name of Granting Body	Country/ Region of Granting Body	Duration of Study

SECTION B: APPLICATION FOR EXEMPTION

Applicants with appropriate qualification(s) may apply exemption for a maximum of THREE subject of CFMP qualification, unless otherwise specified. Please “✓” the subject(s) which you would like to apply for exemption.

Subjects	Please “✓”	For office use only
M1 Regulatory Environment for Banking and Financial Planning	<input type="checkbox"/>	
M2 Investment Products and Markets	<input type="checkbox"/>	
M3 Essentials of Banking and Financial Planning	<input type="checkbox"/>	
M4 Insurance and Retirement Planning	<input type="checkbox"/>	
M5 Investment and Asset Management: Theory and Product Solutions	<input type="checkbox"/>	
M6 Investment and Asset Management: Alternatives and Wealth Solutions	<input type="checkbox"/>	

Total no. of subject(s) applied (please circle) 1 2 3

Note: “M7 Financial Planning and Wealth Management” cannot be exempted

CHECKLIST

- Completed all sections of this form
- Enclosed required fees (by cheques or fill in the credit card mail order payment instructions)
- Enclosed certified true copies of your certificate(s) and official transcripts

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Assessed by	Amount
Entry Date	Send on
Remarks	

