

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
(2018)



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

SECTION A: PERSONAL PARTICULARS

Title <input type="checkbox"/> Mr <input type="checkbox"/> Ms <input type="checkbox"/> Mrs <input type="checkbox"/> Dr <input type="checkbox"/> 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 <input type="checkbox"/> Business <input type="checkbox"/> 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 60 credits of CFMP qualification, unless otherwise specified. Please "✓" the module(s) which you would like to apply for exemption.

Modules	Please "✓"	For office use only
M1 Regulatory Environment for Banking and Financial Planning (Credit:20)	<input type="checkbox"/>	
M2 Investment Products and Markets (Credit:20)	<input type="checkbox"/>	
M3 Essentials of Banking and Financial Planning (Credit:20)	<input type="checkbox"/>	
M4 Insurance and Retirement Planning (Credit:20)	<input type="checkbox"/>	
M5 Investment and Asset Management: Theory and Product Solutions (Credit:20)	<input type="checkbox"/>	
M6 Investment and Asset Management: Alternatives and Wealth Solutions (Credit:20)	<input type="checkbox"/>	

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

Note: "M7 Financial Planning and Wealth Management (Credit: 20)" 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	

SECTION C: PAYMENT

FEES SCHEDULE

Application Fee * (per form)	HK\$200
Exemption Fee # (per module)	HK\$600

* Application fee is non-refundable

Exemption fee will not be charged if the application is unsuccessful

PAYMENT METHOD

Cheque (payable to "THE HONG KONG INSTITUTE OF BANKERS")
Please use separate cheques for Application Fee and Module Exemption Fees (use separate cheque for each module)

Credit Card

Visa MasterCard Amount HK\$ _____

Name of Cardholder _____

Credit card no. _____ - _____ - _____ - _____

Expiry Date ____ / ____ Signature _____

Please fill in the total amount of your Application Fee and Module Exemption Fees

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) The Hong Kong Institute of Bankers; or
 - (ii) Current employer's HR Department; or
 - (iii) Liaison Officer (District Offices), Home Affairs Department of the HKSAR
3. Exemption claims will only be considered for the stated pre-approved / recognised qualifications.
4. The application fee of HK\$200 is non-refundable.
5. Only successful application will be charged for exemption fees. The amount of exemption fee is subject to the number of module(s) approved.
6. Exemption results will normally be given in writing within two months after the receipt of application and supporting documents. If further assessment is needed due to unexpected circumstances, separate notifications will be given. The decision of the Institute is final and cannot be appealed.
7. All documents submitted will not be returned regardless of the result of the application.
8. 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 module(s) 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 fully understand that the Institute reserves the rights to reject any application without sufficient documents (e.g. personal information, certificates, official transcripts, etc.), and to charge application fee as an administration fee.

I confirm that I have read the relevant Programme Handbook and Notes for Exemption printed in this form and fully understand the rules and regulations.

Signature _____ Date _____

For Enquires:

Hong Kong Office:

Address: 3/F Guangdong Investment Tower, 148 Connaught Road Central, Hong Kong
 Telephone no.: (852) 2153 7821 Fax no.: (852) 2544 9946 E-mail: exam@hkib.org Website: <http://www.hkib.org>

Beijing Representative Office:

Address: 8/F, Tower 5, Courtyard 1, Yuetan South Street, Xicheng District, Beijing, China, (Postcode: 100045)
 Telephone no.: (86) 10-6657 5550 Fax no.: (86)10-6657 4966 E-mail: hkib-beijing@hkib.org