



CFMP™

Certified Financial Management Planner

專業財富管理師

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專業財富管理師

With 2 years banking or finance related working experience #

兩年銀行或金融業相關之工作經驗 #

Professional Diploma in Financial Planning and Management for CFMP™

理財策劃及管理專業文憑(專業財富管理師)

Stage 2 第二階段

Case and Oral Examination

個案分析考試

Financial Planning and Management • 理財策劃及管理

Fund and Asset Management • 資產管理

Tax and Estate Planning • 稅務及遺產策劃

Insurance and Retirement Planning • 保險及退休策劃

Advanced Diploma in Financial Planning

理財策劃高等文憑

Stage 1 第一階段

Essentials of Banking and Financial Planning • 銀行業務概要及理財策劃

Investment Products and Markets • 投資產品及市場

Regulatory Environment for Banking and Financial Planning • 銀行及理財策劃規例

HKIB Member with recognized Associate Degree or equivalent

具備認可之副學士學位或同等學歷之香港銀行學會會員

Note # : Candidates who have successfully attained the Professional Diploma but with less than 2 years banking or finance related experience can use the designation "CFMP™ (Affiliate)".

註 # : 已成功獲得理財策劃及管理專業文憑(專業財富管理師)·但擁有少於兩年銀行或金融業相關工作經驗之學員·可使用「準專業財富管理師」稱銜·

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