

- 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.

CFMP-Macau 2023)

Certified Financial Management Planner (CFMP™) – Macau Module Exemption Application Form

SECTION A: PERSONAL PARTICULARS

Title <input type="checkbox"/> Mr <input type="checkbox"/> Ms <input type="checkbox"/> Dr <input type="checkbox"/> Other (please specify)	HKIB Membership No.
Name (Surname)	(Given Name)
ID/Passport No.	
Current Employer, if applicable	
Department	Position
Correspondence Address <input type="checkbox"/> Business <input type="checkbox"/> Residential	
Telephone / Mobile no.	E-mail

SECTION B: APPLICATION FOR EXEMPTION

Applicants with appropriate qualification(s) may apply exemption for CFMP™ (Macau) qualification, unless otherwise specified. Please “✓” the module which you would like to apply for exemption.

Modules	Please “✓”	For office use only
M4 Insurance and Retirement Planning	<input type="checkbox"/>	
Others (Please specify: _____)	<input type="checkbox"/>	

CHECKLIST

- Completed all sections of this form
- Enclosed required fees (fill in the credit card mail order payment instructions)
- Signed on the application form and signature field under Section C: Payment Methods

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Assessed by	Amount
Entry Date	Send on
Remarks	

SECTION C: PAYMENT

FEES SCHEDULE	<u>PAYMENT METHODS</u>				
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">Application Fee * (per form)</td> <td style="text-align: center;">HK\$200</td> </tr> <tr> <td>Exemption Fee # (per module)</td> <td style="text-align: center;">HK\$880</td> </tr> </table> <p>* Application fee is non-refundable</p> <p># Exemption fee will not be charged if the application is unsuccessful</p>	Application Fee * (per form)	HK\$200	Exemption Fee # (per module)	HK\$880	<p>Credit Card (<i>MUST BE SETTLED IN HK DOLLARS</i>)</p> <p><input type="checkbox"/> Visa <input type="checkbox"/> MasterCard Amount HK\$_____</p> <p>Name of Cardholder _____ (Same as on Credit Card)</p> <p>Credit card no. _____ - _____ - _____ - _____</p> <p>Expiry Date ____/____/____ Signature _____</p> <p><i>Please fill in the total amount of your Application Fee and Module Exemption Fee</i></p>
Application Fee * (per form)	HK\$200				
Exemption Fee # (per module)	HK\$880				

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 obtain a pass in Paper I, Paper II and Paper III in Insurance Intermediaries Qualifying Examination (IIQE) offering by Macau Institute of Financial Services (MIFS). Upon receiving the original copy of the application form, Hong Kong Institute of Banker (HKIB) will ask MIFS to verify and confirm the applicant's IIQE results.
3. Completed application form must be submitted to HKIB office by post or courier with the details as below. Application with incomplete information and/or applications by email / fax **will NOT** be accepted. Application sent to HKIB with insufficient postage or packaging will NOT reach HKIB.

Details for courier:
On the envelope, please write "Application for CFMP Exemption - Macau"
Contact Person : The Hong Kong Institute of Bankers
Address : 3/F Guangdong Investment Tower
148 Connaught Road, Central, Hong Kong
Contact Telephone : (852)21537800
4. Exemption claims will only be considered for the stated pre-approved / recognised qualifications.
5. The application fee of HK\$200 is non-refundable.
6. Only successful application will be charged for exemption fee.
7. Exemption result 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.
8. All documents submitted will not be returned regardless of the result of the application.
9. 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™ (Macau) module 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, confirmation of IIQE result, etc.), and to charge the application fee as an administration fee.

I confirm that I have read the (CFMP™) 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>