

**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-Macau  
(2018)



**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"/> Mrs <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

**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 20 credits of CFMP (Macau) qualification, unless otherwise specified. Please “✓” the module which you would like to apply for exemption.

Subjects	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"/>	

*Note: “M7 Financial Planning and Wealth Management(Credit: 20)” cannot be exempted*

**CHECKLIST**

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

**FOR OFFICE USE ONLY**

Assessed by	Amount
Entry Date	Send on
Remarks	

**SECTION C: PAYMENT**

<b>FEES SCHEDULE</b>	
Application Fee * (per form)	HK\$200 (MOP206)
Exemption Fee # (per module)	HK\$600 (MOP618)

\* Application fee is non-refundable

# Exemption fee will not be charged if the application is unsuccessful

<b>PAYMENT METHOD</b>
Credit Card ( <i>MUST BE SETTLED IN HK DOLLARS</i> )
<input type="checkbox"/> Visa <input type="checkbox"/> MasterCard    Amount HK\$ _____
Name of Cardholder _____
Credit card no. _____ - _____ - _____ - _____
Expiry Date ____ / ____    Signature _____
<b>Please fill in the total amount of your Application Fee and Module Exemption Fee</b>

<b>NOTES FOR EXEMPTION</b>
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 <b>certified true copies</b> 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) Macau Institute of Financial Services (MIFS)
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.
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.

<b>ACKNOWLEDGEMENT AND DECLARATION</b>
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, 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](mailto:exam@hkib.org)    Website: <http://www.hkib.org>