



註冊財務策劃師協會
Society of Registered Financial Planners

Examination Application Form
(Hong Kong Candidate Only)

Personal particulars (Typewritten or block capitals)

Name : _____ HKID No. : _____

Sex : Male / Female Student member No. : _____

Day Tel : _____ Mobile Tel : _____

Fax : _____ Email address : _____

Correspondence address: _____

Diet of exam : June 20___. Dec 20__.

Exam Language : English

Examination fees	HKD
Administration fee	-
FP3010 – Financial Planning	\$ 800 _____
FP3020 – Insurance Planning	\$ 800 _____
FP3030 – Investment Planning	\$ 800 _____
FP3040 – Tax Planning	\$ 800 _____
FP3050 – Best Practices for Financial Planners	\$ 800 _____
	Total:

For official use only	
Membership category :	
Student	<input type="checkbox"/>
Associate	<input type="checkbox"/>
Secretarial: fee collected	<input type="checkbox"/>
Cheque: _____	
Bank : _____	

Sign by Student :

Date : _____

Application Procedures

1. Application

Application can be done in person or by mail to HKRFP by completing the Application Form together with the application fee and appropriate course fee and relevant documents.

2. Application Form

Application Form may be:

- downloaded from the HKRFP website <http://www.hkrfp.org>; PDF format, or
- obtained in person at the HKRFP office

3. Application Deadline

The application deadlines are announced on the web site prior to examinations. Late applications will not be considered.

Applications will only be accepted if the following requirements are met:

- Application Form signed and dated; and
- Application and examination fee or exemption fee enclosed;
- Supporting documentation for education qualification enclosed for exemption assessment.

Incomplete applications will not be processed until all requirements have been met.

4. Submission

- Application and examination fee must be submitted with the form together with a crossed cheque made payable to “**Society of Registered Financial Planners**” at:

P. O. Box 1254, General Post Office, Central, Hong Kong

5. Notification of Application Result

- Results of Applications will be sent to the applicants at least THREE WEEKS before the date of examination. For successful applicants, a letter from HKRFP indicating that they are qualified to sit for the HKRFP Examinations will be sent together.
- The letter from HKRFP should be retained as it serves as an official proof for examination qualification.

6. Unsuccessful Application

- For unsuccessful applications, the administration fee will not be refunded.
- All paid examination fee will be refunded to the applicant for all unsuccessful applications.

7. Examination Advice Notice

- Qualified candidates will receive an Examination Advice Notice which time and location of the examination venue will be printed, at least TWO WEEKS before the date of examination.
- Qualified candidates should contact HKRFP if they do not receive the Advice FIVE WORKING DAYS before the examination or if they find any mistakes on the form.

8. Withdrawal

- Candidate who wishes to withdraw from the examination, may apply to the Society for withdrawal TWO WEEKS before the examination; a withdrawal fee of **HK\$ 300 per module** will be charged. Any examination fees paid will not be refunded within TWO WEEKS prior to the examinations.