

## EXEMPTION APPLICATION FORM

### APPLICATION FOR EXEMPTION FOR THE CFP® CERTIFICATION PROGRAMME

#### EXEMPTION GUIDELINES

1. Candidates may apply for exemptions of up to a maximum of 4 modules of the CFP® Certification Programme.
2. A processing fee of \$100.00 is payable for each module applied.
3. Processing time for pre-approved and non pre-approved qualifications is 2 weeks and 4 weeks respectively.

#### APPLICATION INSTRUCTIONS

##### Requirements to qualify for exemptions:

To qualify for an exemption the applicant's qualification must meet all of the following requirements:

1. Qualification is awarded by an institution recognized by FPAS. What is deemed as recognized is at the full discretion of FPAS.
2. Qualification is of an equivalent or of a higher academic standard than that of the FPAS' Certification Program.
3. The course contents of the applicant's qualification must have covered the equivalent course contents of the FPAS' qualification.

##### Documents required:

1. If your qualification(s) has/have met all the above qualifying criteria, you can then proceed to complete the application form.
2. Certified true copy of your certificate, results transcripts and copy of the relevant curriculum details must be submitted together with this application.
3. Cheque payment to "FPAS"

The following tables list various courses, degrees or professional qualifications and designations which qualify for exemption from one or more course modules.

Courses	Modules Exempted
CFA	Module 4 course and examination
CPA	Module 3 course and examination

Any other courses not covered above will be considered on a case-by-case basis, to be approved by the Exemption Committee.

CFP® practitioners who are currently certified overseas and wish to localise their CFP® certification, are required to just register for and pass the 3-hour challenge paper (which is the Module 6 examination) with a maximum of 1 retake. Failing that, they will have to take the CFP® certification program course and examination.

FPAS Membership No

<b>Name</b>	<b>Contact No. (O)</b>
<b>NRIC No.</b>	<b>Contact No. (HP)</b>
<b>Address</b>	<b>Email</b>

Exemptions applied for [Please tick appropriate box(es)] :

- Module 2 - Risk Management & Insurance Planning** 
   
 **Module 4 - Investment Planning**   
**Module 3 - Tax Planning & Estate Planning** 
   
 **Module 5 - Retirement Planning**

**Transcripts from the following accredited institutions are attached for review**

Qualification Awarded	Major (If applicable)	Name of Institution	Year Awarded

**Occupational Details (Starting with most current)**

Period (E.g. 1991-2000)	Company	Position Held	Job Scopes / Duties

**Please note:**

- You must provide photocopies of relevant academic transcripts or certificates upon which exemption is sought.
- Candidates may apply for an exemption for a course that has not been registered by FPAS, but must provide a topic outline or course curriculum and details of assessment methods applied.
- Your exemption application will be processed within 30 working days of its receipt by FPAS. A written notification will be sent to you on the status.
- A processing fee of \$100.00 is payable for **each module applied for exemption**  
 (Payment can be made via e-Payment via FPAS Website or Credit Card at FPAS office or Cheque via mail)
- FPAS reserves the right to change the list of registered courses/subjects without notice.

I affirm that the facts given are true and correct to the best of my knowledge.

Signature \_\_\_\_\_ Date \_\_\_\_\_

**Payment Details (please complete)**

<b>EPayment</b>	<b>Please write the reference number</b>	<b>Cheque Payment:</b>	
Reference No : EPaymentID_	<input type="text"/>	Bank :	Cheque Number:
Transaction Date:		Date of Cheque:	
Fee Payable : SGD \$ 100.00		Fee Payable : SGD \$ 100.00	

**For FPAS' Use Only**

Exemption	Status	Reason(s) / Remark(s)
Module 2	Yes / No	
Module 3	Yes / No	
Module 4	Yes / No	
Module 5	Yes / No	

Recommended by: **Certification Manager**                     
 Concurred By: **CEO, FPAS**                                     
 Endorsed By: **Chairman, Certification Board**                     
 Approved By: **President, FPAS**