

Guideline on "Fit and Proper" Criteria for Licensed Insurance Intermediaries under the Insurance Ordinance (Cap. 41)

List of Acceptable Insurance Qualifications

The insurance qualifications specified for the purpose of paragraph 5.2(a)(vii) in respect of an Individual Licensee¹ and paragraph 5.4(a)(ii) in respect of a Responsible Officer in the Guideline on "Fit and Proper" Criteria for Licensed Insurance Intermediaries under the Insurance Ordinance (Cap. 41) are set out in the table below.

Acceptable Insurance Qualification	Individual Licensee	Responsible Officer
The Australian and New Zealand Institute of Insurance and Finance (Senior Associate) (ANZIIF Snr Assoc)	✓	--
The Australian and New Zealand Institute of Insurance and Finance (Fellow) (ANZIIF Fellow)	✓	✓
Chartered Insurance Institute (Advanced Diploma in Insurance) (ACII)	✓	✓
Chartered Insurance Institute (Fellowship) (FCII)	✓	✓
Chartered Financial Planner (CFP)	✓	--
Chartered Life Underwriter (CLU)	✓	✓
Chartered Property Casualty Underwriter (CPCU)	✓	✓
Hong Kong Diploma in Insurance Studies awarded by the Chartered Insurance Institute or the former Insurance Institute of Hong Kong	✓	--
The Institute of Actuaries of Australia (Fellow) (FIAA)	✓	✓
The Institute and Faculty of Actuaries of the United Kingdom (Fellow) (FIA/FFA)	✓	✓
Fellow, Life Management Institute (FLMI)	✓	--
The Society of Actuaries of the United States of America (Fellow) (FSA)	✓	✓

✓ - Acceptable

¹ "Individual Licensee" means:

- (i) a licensed individual insurance agent
- (ii) a licensed technical representative (agent); or
- (iii) a licensed technical representative (broker).