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 Licensee[1] 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	✓	--
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) *(a) With effect from 28 August 2026, FLMI is suspended from being recognized as an insurance qualification specified for the purposes of paragraph 5.2(a)(vii) in respect of an Individual Licensee. (b) Any FLMI obtained, or being obtained, prior to 28 August 2026, through an examination centre other than the centre operated by Greater China Wemedia Association Limited, shall be considered separately on a case-by-case basis.	*	--
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).