

Examinees may also refer to the following references and website relevant sections on local ordinances, the taxation regime and regulatory framework of the financial services industry:

- Advanced Financial Planning – Case Analysis and Suggested Approach
- AFP Certification Renewal Policy and Guidelines on Continuing Education Requirements
- Candidacy Renewal Policy
- CFP Certification Manual
- CFP Certification Renewal Policy and Guidelines on Continuing Education Requirements
- Code of Conduct for Persons Licensed by or Registered with the Securities and Futures Commission Securities, SFC
- Code of Ethics and Professional Responsibility
- Disciplinary Rules and Procedures
- Employee Benefits and Estate Planning, John Wiley & Sons, (Asia)
- Essentials of Investments, Bodie, Kane and Marcus, McGraw-Hill/Irwin
- Financial Planning Practice Standards
- FPSB Financial Planner Competency profile, FPSB
- Fundamentals of Financial Planning, Cheng, McGraw Hill Education (Asia)
- Fundamentals of Risk and Insurance, John Wiley & Sons (Asia)
- Guide to use the AFP Marks
- Guide to use the CFP Marks
- Supplementary Notes for AFP Certification
- IIQE - Study Notes for the General Insurance Examination, IA
- IIQE - Study Notes for the Principles and Practice of Insurance Examination, IA
- IIQE - Study Notes for the Long Term Insurance Examination, IA
- IIQE - Study Notes for the Investment-link Long Term Insurance Examination, IA
- IIQE - Study Notes for the Travel Insurance Agents Examination, IA
- IFPHK Practice Guide for financial Planners, IFPHK
- OCI Annual Report 2009 – Other measures for Customer protection
- Study note for MPF Intermediaries Examination, MPFA
- Supplementary note for Taxation and Tax Planning
- Taxation in Hong Kong: A Practical Guide, Wong & Wong, Wolters Kluwer (HK)
- Department of Justice, Bilingual Laws Information System: [www.legislation.gov.hk](http://www.legislation.gov.hk)
- Hong Kong Monetary Authority: [www.info.gov.hk/hkma/](http://www.info.gov.hk/hkma/)
- Inland Revenue Department: [www.info.gov.hk/ird](http://www.info.gov.hk/ird)
- Mandatory Provident Fund Schemes Authority: [www.mpfahk.org](http://www.mpfahk.org)
- Insurance Authority: <https://www.ia.org.hk/>
- Securities and Futures Commission: [www.sfc.hk](http://www.sfc.hk)
- Officer of the Privacy Commissioner for Personal Data: [www.pcpd.org.hk](http://www.pcpd.org.hk)
- Social Welfare Department: [www.swd.gov.hk](http://www.swd.gov.hk)
- Civil Service Bureau: <http://www.csb.gov.hk>
- Education Bureau: <http://www.edb.gov.hk>