

Enhanced Competency Framework (ECF) on Retail Wealth Management (Core & Professional Level) Training and Examination Schedule

Important Notes:

1. HKIB has been appointed as the Professional Qualification Assessment Agency effective from 1 August 2020.
2. Learners who pass the examination under Assessment Agencies of Professional Qualifications with relevant work experience will be eligible to pursue a **QF-recognised Professional Qualification** (i.e. ARWP*/CRWP#).

For more details about Assessment Agencies for Professional Qualifications and Learning Programme Accreditation, please refer to [accreditation page](#) under HKIB website for reference.

*Recognised under the QF at Level 4, QR Registration No.: 20/000536/L4, Validity Period from 01/08/2020 to 31/07/2025

#Recognised under the QF at Level 5, QR Registration No.: 20/000539/L5, Validity Period from 01/08/2020 to 31/07/2025



IA CPD¹



HKIB CPD²



SFC CPT



FLEX Learning³



WAM Programme⁴

Training: Q1 – Q4 2024

Module Name	Module No.	Code	Date	Time	Language (Supplemented with English materials)	Application Deadline ⁵	Fee ^{6,7} (HKD)
Essentials of Banking (Credit: 20)	3	HERW03P24031 FLEX Learning – Virtual Classroom	6 Mar 2024 (Wed)	19:00 – 22:00	Cantonese	CLOSED	
			13 Mar 2024 (Wed)				
			20 Mar 2024 (Wed)				
			27 Mar 2024 (Wed)				
		3 Apr 2024 (Wed)					
HERW03P24061 FLEX Learning – Virtual Classroom	1 Jun 2024 (Sat)	10:00 – 13:00 & 14:00 – 17:00 on 01 & 08 Jun	Cantonese	CLOSED			
	8 Jun 2024 (Sat)						
HERW03P24071 Face-to-face Training		15 Jun 2024 (Sat)	10:00 – 13:00 on 15 Jun	Cantonese	CANCELLED		
		17 Jul 2024 (Wed)	10:00 – 13:00 & 14:00 – 17:00 on 17 & 24 Jul				
		24 Jul 2024 (Wed)	10:00 – 13:00 on 31 Jul				
HERW03P24081 Face-to-face Training		27 Aug 2024 (Tue)	10:00 – 13:00 & 14:00 – 17:00 on 27 Aug, 3 Sep	Cantonese	13 Aug 2024 (Tue)	4,200	
		3 Sep 2024 (Tue)	10:00 – 13:00 on 10 Sep				
HERW03P24101 FLEX Learning – Virtual Classroom		10 Sep 2024 (Tue)	19:00 – 22:00	Cantonese	19 Sep 2024 (Thu)	4,200	
		3 Oct 2024 (Thu)					
		10 Oct 2024 (Thu)					
		17 Oct 2024 (Thu)					
		24 Oct 2024 (Thu)					
		31 Oct 2024 (Thu)					
Investment and Asset Management: Product Solutions (Credit: 20)	5	HERW05P24031 FLEX Learning – Virtual Classroom	2 Mar 2024 (Sat)	10:00 – 13:00 & 14:00 – 17:00 on 2 & 9 Mar	Cantonese	CLOSED	
			9 Mar 2024 (Sat)				
		16 Mar 2024 (Sat)	10:00 – 13:00 on 16 Mar				
HERW05P24081 Face-to-face Training		8 Aug 2024 (Thu)	10:00 – 13:00 & 14:00 – 17:00 on 8 & 15 Aug	Cantonese	CANCELLED		
		15 Aug 2024 (Thu)	10:00 – 13:00 on 22 Aug				
		22 Aug 2024 (Thu)	19:00 – 22:00				
HERW05P24101 FLEX Learning – Virtual Classroom		8 Oct 2024 (Tue)	19:00 – 22:00	Cantonese	23 Sep 2024 (Mon)	4,200	
		15 Oct 2024 (Tue)					
		22 Oct 2024 (Tue)					
		29 Oct 2024 (Tue)					
		05 Nov 2024 (Tue)					

Investment and Asset Management: Alternatives and Wealth Solutions (Credit: 20)	6	HERW06P24041 FLEX Learning – Virtual Classroom	10 Apr 2024 (Wed) 17 Apr 2024 (Wed) 24 Apr 2024 (Wed) 30 Apr 2024 (Tue) 8 May 2024 (Wed)	19:00 – 22:00	Cantonese	CLOSED	
		HERW06P24051 Face-to-face Training	9 May 2024 (Thu) 23 May 2024 (Thu) 29 May 2024 (Wed)	9:00 – 12:00 & 14:00 – 17:00 on 9 & 23 May 9:00 – 12:00 on 29 May	Cantonese	CLOSED	
		HERW06P24091 Face-to-face Training	12 Sep 2024 (Thu) 19 Sep 2024 (Thu) 26 Sep 2024 (Thu)	10:00 – 13:00 & 14:00 – 17:00 on 12 & 19 Sep 10:00 – 13:00 on 26 Sep	Cantonese	29 Aug (Thu)	4,200
		HERW06P24111 FLEX Learning – Virtual Classroom	12 Nov 2024 (Tue) 19 Nov 2024 (Tue) 26 Nov 2024 (Tue) 3 Dec 2024 (Tue) 10 Dec 2024 (Tue)	19:00 – 22:00	Cantonese	29 Oct 2024 (Tue)	4,200
Financial Planning and Wealth Management (Credit: 20)	7	HERW07P24051 Face-to-face Training	22 May 2024 (Wed) 29 May 2024 (Wed) 5 Jun 2024 (Wed) 12 Jun 2024 (Wed) 19 Jun 2024 (Wed)	19:00 – 22:00	Cantonese	CLOSED	
		HERW07P24101 Face-to-face Training	9 Oct 2024 (Wed) 16 Oct 2024 (Wed) 22 Oct 2024 (Wed)	10:00 – 13:00 & 14:00 – 17:00 on 9 & 16 Oct 10:00 – 13:00 on 22 Oct	Cantonese	24 Sep 2024 (Tue)	4,200
		HERW07P24111 Face-to-face Training	23 Nov 2024 (Sat) 30 Nov 2024 (Sat) 7 Dec 2024 (Sat)	10:00 – 13:00 & 14:00 – 17:00 on 23 & 30 10:00 – 13:00 on 7 Dec	Cantonese	11 Nov 2024 (Mon)	4,200

Examination: Q2 – Q4 2024, Q1 2025

In general, the candidates need around 2 months self-studying time to prepare for the examination. However, you may select the most appropriate examination session according to your competence level and learning plan.

Module Name	Module No.	Code	Date	Time	Application Deadline ⁵	Fee (HKD) ⁶
Essentials of Banking (Credit: 20)	3	EXAM-2022-10341	30 May 2024 (Thu)	19:00 - 21:30	CLOSED	
		EXAM-2022-10351	18 Jul 2024 (Thu)	19:00 - 21:30	CLOSED	
		EXAM-2022-10447	3 Sep 2024 (Tue)	19:00 - 21:30	2 Aug 2024 (Fri)	1,150
		EXAM-2022-10448	8 Oct 2024 (Tue)	19:00 - 21:30	9 Sep 2024 (Mon)	1,150
		EXAM-2022-10379	3 Dec 2024 (Tue)	19:00 - 21:30	4 Nov 2024 (Mon)	1,150
Investment and Asset Management: Product Solutions (Credit: 20)	5	EXAM-2022-10319	16 Apr 2024 (Tue)	19:00 - 21:30	CLOSED	
		EXAM-2022-10449	25 Sep 2024 (Wed)	19:00 - 21:30	26 Aug 2024 (Mon)	1,150
		EXAM-2022-10450	30 Oct 2024 (Wed)	19:00 - 21:30	30 Sep 2024 (Mon)	1,150
		EXAM-2022-10380	10 Dec 2024 (Tue)	19:00 - 21:30	11 Nov 2024 (Mon)	1,150

Investment and Asset Management: Alternatives and Wealth Solutions (Credit: 20)	6	EXAM-2022-10344	2 Jul 2024 (Tue)	19:00 - 21:30	CLOSED	
		EXAM-2022-10451	31 Oct 2024 (Thu)	19:00 - 21:30	30 Sep 2024 (Mon)	1,150
		EXAM-2022-10452	3 Dec 2024 (Tue)	19:00 - 21:30	4 Nov 2024 (Mon)	1,150
		EXAM-2022-10381	16 Jan 2025 (Thu)	19:00 - 21:30	16 Dec 2024 (Mon)	1,200
Financial Planning and Wealth Management (Credit: 20)	7	(Multiple Choice) EXAM-2022-10352	2 Aug 2024 (Fri)	19:00 – 20:15	2 Jul 2024 (Tue)	1,150 ⁹
		(Case & Oral) ⁸ EXAM-2022-10353	4 Aug 2024 (Sun)	TBC		
		(Multiple Choice) EXAM-2022-10453	21 Nov 2024 (Thu)	19:00 – 20:15	21 Oct 2024 (Mon)	1,150 ⁹
		(Case & Oral) ⁸ EXAM-2022-10455	24 Nov 2024 (Sun)	TBC		
		(Multiple Choice) EXAM-2022-10454	2 Jan 2025 (Thu)	19:00 – 20:15	2 Dec 2024 (Mon)	600
		(Case & Oral) ⁸ EXAM-2022-10456	5 Jan 2025 (Sun)	TBC	5 Dec 2024 (Thu)	1,200
		(Multiple Choice) EXAM-2022-10382	7 Feb 2025 (Fri)	19:00 – 20:15	7 Jan 2025 (Tue)	600
		(Case & Oral) ⁸ EXAM-2022-10383	9 Feb 2025 (Sun)	TBC	9 Jan 2025 (Thu)	1,200


Special Note:

- Learners are required to complete the training before attempting the examination
- For Modules 1, 2 & 4, please contact HKIB for further details
- For Module 7 applicants:
 - a. Please note that you are required to complete the training and examination of Module 1 to Module 6 before applying the training for Module 7.
 - b. For Module 1, Module 2 and Module 4, exemption from HKIB as equivalent is accepted. However, you should apply the exemption at least 2 months before the Module 7 training start date.

Programme Details

- Programme / Module Outline : Please refer to the programme brochure and the handbook for details
- Venue : 3/F Guangdong Investment Tower, 148 Connaught Road Central, HK (Sheung Wan MTR Station Exit C) (unless other venue specified in training class confirmation / examination attendance notice)
- Enrolment : Applicants can submit via the electronic application form in HKIB webpage.

Notes:

Note	Category	Details
1 & 2	CPD	- IA CPD will be applicable to Modules 3, 5, 6 & 7 only - By attending the above training, Professional Qualification holders of ARWP, CRWP, ACsP, AORP, CORP, ACOP, CCOP(GC), CCOP(IIC), ACRP, CCRP(CL), CCRP(CPM), CPFInT(A), CPFInT(M), CPFInT(S-AIBD), CPFInT(S-DLT), CPFInT(S-OBAPI) and CPFInT(S-RT), CB (Stage I), CB (Stage II), CB, and CFMP are eligible to claim HKIB CPD hours.
3	FLEX Learning	The training sessions will be conducted via virtual classroom training delivery mode. Participants can use their own PC or mobile device, and do not need to come to our premises to attend the training.
4	WAM	 The programme has been included in the list of reimbursable courses for WAM pilot programme. For WAM pilot programme applicants, 80% of the course fee (examination fee excluded) will be reimbursed upon meeting the 80% attendance requirement. For more details, please visit: www.wamtalent.org.hk .
5	Late Application	A late entry fee of HKD200 will apply for late training and examination enrolment respectively.
6	Fee Discount	HKIB student members can enjoy 25% off training fee discount and 50% off examination fee discount respectively.
7	Training Materials	A digital version of Study Guide and PPT Slides will be provided before the training commencement. Printed version will only be available at an additional cost of HKD600 (including delivery fee) on request by learners.
8	Examination (Time)	Exam candidates of M7 Case & Oral will be informed of the exam time via Exam Attendance Notice. Exam candidates are recommended to reserve the day.
9	Examination (Fee)	The re-sitting examination fees for M7 Multiple Choice and M7 Case & Oral are HKD1,150 respectively. (only applicable to the examination in 2024)
	Others	HKIB reserves the right to cancel, change, and/or postpone the training and/or examination schedule.

For General Enquiries / Feedback:

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