

Enhanced Competency Framework (ECF) on Retail Wealth Management (Core & Professional Level) Training and Examination Schedule – 2020

Training: Q3 – Q4 2020  IA CPD¹  HKIB CPD²  SFC CPT  WAM Programme³  FLEX Learning - FLEX Learning

Module Name	Module No.	Code	Date	Time	Language (Supplemented with English materials)	Application Deadline ⁴	Fee ⁵ (HKD)
Essentials of Banking (Credit: 20)	3	HQRM003PP200601 2020 version! ⁶ FLEX Learning – Virtual Classroom³	9, 16, 23, Jun 2020 (Tue) 29 Jun 2020 (Mon) 6 Jul 2020 (Mon)	19:00 – 22:00	Cantonese	29 May 2020 (Fri)	3,900
		HQRM003PP200801 2020 version! ⁶	1, 8, 15, 22, 29 Aug 2020 (Sat)	10:00 – 13:00		23 Jul 2020 (Thu)	3,900
Investment and Asset Management: Product Solutions (Credit: 20)	5	HQRM005PP200802 2020 version! ⁶	7 Aug (Fri) 13 Aug (Thu) 21 Aug (Fri) 25 Aug (Tue) 4 Sep (Fri)	19:00 – 22:00		29 Jul 2020 (Wed)	3,900
Investment and Asset Management: Alternatives and Wealth Solutions (Credit: 20)	6	HQRM006PP200506 2020 version! ⁶ FLEX Learning – Virtual Classroom³	20, 27 May 2020 (Wed); 22 May, 2020 (Fri) 4 Jun 2020 (Thu); 10, Jun 2020 (Wed)	19:00 – 22:00		11 May 2020 (Mon)	3,900
		HQRM006PP200803 2020 version! ⁶	29 Aug 2020 (Sat) 5, 12 Sep 2020 (Sat)	10:00 – 13:00, 14:00 – 17:00 on 29 Aug & 5 Sep 10:00 – 13:00 On 12 Sep		20 Aug 2020 (Thu)	3,900
Financial Planning and Wealth Management (Credit: 20)	7	HQRM007PP200507 2020 version! ⁶ FLEX Learning – Virtual Classroom³	22, 29 May 2020 (Fri); 5, 12, 19 Jun 2020 (Fri)	19:00 – 22:00		13 May 2020 (Wed)	3,900
		HQRM007PP201101 2020 version! ⁶	4, 11 Nov 2020 (Wed) 17, 24 Nov 2020 (Tue) 1 Dec 2020 (Tue)	19:00 – 22:00		23-Oct-20 (Fri)	3,900

Examination: Q1 – Q4 2020, Q1 2021

Module Name	Module No.	Code	Date	Time	Application Deadline ⁴	Fee ⁵ (HK\$)
Essentials of Banking (Credit: 20)	3	EXAM-2020-00144 2019 version! ⁶	16 Jul 2020 (Thu)	19:00 – 21:30	22 Jun 2020 (Mon)	1,060
		EXAM-2020-00054 2020 version! ⁶	16 Jul 2020 (Thu)	19:00 – 21:30	22 Jun 2020 (Mon)	1,060
		EXAM-2020-00014 2019 version! ⁶	20 Aug 2020 (Thu)	19:00 – 21:30	20 Jul 2020 (Mon)	1,060
		EXAM-2020-00055 2020 version! ⁶	20 Aug 2020 (Thu)	19:00 – 21:30	20 Jul 2020 (Mon)	1,060
		EXAM-2020-00015 2019 version! ⁶	10 Sep 2020 (Thu)	19:00 – 21:30	10 Aug 2020 (Mon)	1,060
		EXAM-2020-00093 2020 version! ⁶	10 Sep 2020 (Thu)	19:00 – 21:30	10 Aug 2020 (Mon)	1,060
		EXAM-2020-00094 2020 version! ⁶	15 Oct 2020 (Thu)	19:00 – 21:30	15 Sep 2020 (Tue)	1,060
		EXAM-2020-00095 2020 version! ⁶	12 Nov 2020 (Thu)	19:00 – 21:30	12 Oct 2020 (Mon)	1,060
Investment and Asset Management: Product Solutions (Credit: 20)	5	EXAM-2020-00041 2019 version! ⁶	23 Jul 2020 (Thu)	19:00 – 21:30	23 Jun 2020 (Tue)	1,060
		EXAM-2020-00057 2020 version! ⁶	23 Jul 2020 (Thu)	19:00 – 21:30	23 Jun 2020 (Tue)	1,060
		EXAM-2020-00019 2019 version! ⁶	11 Aug 2020 (Tue)	19:00 – 21:30	13 Jul 2020 (Mon)	1,060
		EXAM-2020-00058 2020 version! ⁶	11 Aug 2020 (Tue)	19:00 – 21:30	13 Jul 2020 (Mon)	1,060
		EXAM-2020-00020 2019 version! ⁶	17 Sep 2020 (Thu)	19:00 – 21:30	17 Aug 2020 (Mon)	1,060
		EXAM-2020-00097 2020 version! ⁶	17 Sep 2020 (Thu)	19:00 – 21:30	17 Aug 2020 (Mon)	1,060
		EXAM-2020-00098 2020 version! ⁶	22 Oct 2020 (Thu)	19:00 – 21:30	22 Sep 2020 (Tue)	1,060
		EXAM-2020-00099 2020 version! ⁶	19 Nov 2020 (Thu)	19:00 – 21:30	19 Oct 2020 (Mon)	1,060
		EXAM-2020-00100 2020 version! ⁶	17 Dec 2020 (Thu)	19:00 – 21:30	17 Nov 2020 (Tue)	1,060
		Investment and Asset Management: Alternatives and Wealth Solutions (Credit: 20)	6	EXAM-2020-00050 2020 version! ⁶	7 Jul 2020 (Tue)	19:00 – 21:30
EXAM-2020-00051 2020 version! ⁶	4 Aug 2020 (Tue)			19:00 – 21:30	6 Jul 2020 (Mon)	1,060
EXAM-2020-00052 2020 version! ⁶	7 Sep 2020 (Mon)			19:00 – 21:30	7 Aug 2020 (Fri)	1,060
EXAM-2020-00101 2020 version! ⁶	6 Oct 2020 (Tue)			19:00 – 21:30	4 Sep 2020 (Fri)	1,060
EXAM-2020-00102 2020 version! ⁶	6 Nov 2020 (Fri)			19:00 – 21:30	6 Oct 2020 (Tue)	1,060
EXAM-2020-00103 2020 version! ⁶	7 Dec 2020 (Mon)			19:00 – 21:30	6 Nov 2020 (Fri)	1,060

Financial Planning and Wealth Management (Credit: 20)	7	(Multiple Choice) EXAM-2020-00109 2020 version! ⁶	23 Oct 2020 (Fri)	TBC	23 Sep 2020 (Wed)	1,060 ⁸
		(Case & Oral) ⁷ EXAM-2020-00107 2020 version! ⁶	25 Oct 2020 (Sun)	TBC	25 Sep 2020 (Fri)	
		(Multiple Choice) EXAM-2020-00104 2020 version! ⁶	26 Feb 2021 (Fri)	TBC	26 Jan 2021 (Tue)	TBC
		(Case & Oral) ⁷ EXAM-2020-00108 2020 version! ⁶	28 Feb 2021 (Sun)	TBC	28 Jan 2021 (Thu)	

Special Note:


- According to the accreditation of HKCAAVQ on “Professional Certificate for ECF on Retail Wealth Management (RWM), an average learner is expected to spend 3 to 4 months to complete the respective training and examination of individual modules
- Learners are required to enrol in and complete the training before attempting the examination
- For Module 1, 2 & 4, please contact HKIB for further details

Programme Details:

Venue: 3/F Guangdong Investment Tower, 148 Connaught Road Central, Hong Kong (Sheung Wan MTR Station Exit C)
(unless other venue specified in training class confirmation / examination attendance notice)

Enrolment: By Email at application@hkib.org or submit to our institute in person or by mail

Note:

1. IA CPD will be applicable to Module 3, 5, 6 & 7 only
2. HKIB CPD includes CPD for CB (Stage I), CB (Stage II), CB, CFMP, ARWP, CRWP, ACsP, ACRP, CCRP(CL) and CCRP(CPM) designation holders.
3.  The programme has been included in the list of reimbursable courses for WAM pilot programme. Please note that training conducted in virtual classroom will not be applicable to WAM programme reimbursement. 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.
4. A late entry fee of HKD200 will apply for late training and examination enrolment respectively.
5. HKIB student members can enjoy 25% off training fee discount and 50% off examination fee discount respectively.
6. The 2020 new training and examination version will be adopted starting from Mar 2020 and Jun 2020 respectively.
7. 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.
8. The re-sitting examination fees for M7 Multiple Choice and M7 Case & Oral are HKD1,060 respectively.
9. HKIB reserves the right to cancel, modify, and/or postpone the training and/or examination.

For Enquiries:

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