



Enhanced Competency Framework (ECF) on Retail Wealth Management (Core & Professional Level) Training and Examination Schedule – 2022

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#).
3. Learners who have attended the same training earlier are welcome to attempt the examinations in the below intakes.

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

Training: Q1 – Q2 2022



IA CPD¹



HKIB CPD²



SFC CPT



WAM Programme³



FLEX Learning⁴

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	HQRM003PP220101 FLEX Learning – Virtual Classroom	5 Jan 2022 (Wed) 12 Jan 2022 (Wed) 19 Jan 2022 (Wed) 26 Jan 2022 (Wed) 9 Feb 2022 (Wed)	19:00 – 22:00	Cantonese	21 Dec 2021 (Tue)	3,900
		HQRM003PP220401 FLEX Learning – Virtual Classroom	6 Apr 2022 (Wed) 13 Apr 2022 (Wed) 20 Apr 2022 (Wed) 27 Apr 2022 (Wed) 4 May 2022 (Wed)	19:00 – 22:00		22 Mar 2022 (Tue)	3,900
Insurance and Retirement Planning (Credit: 20)	4	HQRM004PP220201 FLEX Learning – Virtual Classroom	19 Feb 2022 (Sat) 26 Feb 2022 (Sat) 5 Mar 2022 (Sat)	9:00 – 12:00; 13:00 – 16:00 on 19 Feb & 26 Feb 9:00 – 12:00 on 5 Mar		7 Feb 2022 (Mon)	3,900
Investment and Asset Management: Product Solutions (Credit: 20)	5	HQRM005PP220201 FLEX Learning – Virtual Classroom	5 Feb 2022 (Sat) 12 Feb 2022 (Sat) 19 Feb 2022 (Sat)	10:00 – 13:00; 14:00 – 17:00 on 5 Feb & 12 Feb 10:00 – 13:00 on 19 Feb	Cantonese	19 Jan 2022 (Wed)	3,900
		HQRM005PP220501 FLEX Learning – Virtual Classroom	5 May 2022 (Thu) 12 May 2022 (Thu) 19 May 2022 (Thu) 26 May 2022 (Thu) 2 Jun 2022 (Thu)	19:00 – 22:00		20 Apr 2022 (Wed)	3,900
Investment and Asset Management: Alternatives and Wealth Solutions (Credit: 20)	6	HQRM006PP220301 FLEX Learning – Virtual Classroom	5 Mar 2022 (Sat) 12 Mar 2022 (Sat) 19 Mar 2022 (Sat)	10:00 – 13:00; 14:00 – 17:00 on 5 Mar & 12 Mar 10:00 – 13:00 on 19 Mar	Cantonese	21 Feb 2022 (Mon)	3,900
		HQRM006PP220601 FLEX Learning – Virtual Classroom	1 Jun 2022 (Wed) 8 Jun 2022 (Wed) 15 Jun 2022 (Wed) 22 Jun 2022 (Wed) 29 Jun 2022 (Wed)	19:00 – 22:00		18 May 2022 (Wed)	3,900
Financial Planning and Wealth Management (Credit: 20)	7	HQRM007PP220301 FLEX Learning – Virtual Classroom	1 Mar 2022 (Tue) 8 Mar 2022 (Tue) 15 Mar 2022 (Tue) 22 Mar 2022 (Tue) 29 Mar 2022 (Tue)	19:00 – 22:00	Cantonese	15 Feb 2022 (Tue)	3,900
		HQRM007PP220601 FLEX Learning – Virtual Classroom	2 Jun 2022 (Thu) 9 Jun 2022 (Thu) 16 Jun 2022 (Thu) 23 Jun 2022 (Thu) 30 Jun 2022 (Thu)	19:00 – 22:00		19 May 2022 (Thu)	3,900

Examination: Q1 – Q3 2022

Module Name	Module No.	Code	Date	Time	Application Deadline ⁵	Fee ⁶ (HKD)
Essentials of Banking (Credit: 20)	3	EXAM-2021-00185	26 Apr 2022 (Tue)	19:00 – 21:30	25 Mar 2022 (Fri)	1,060
		EXAM-2021-00205	9 Jun 2022 (Thu)	19:00 – 21:30	6 May 2022 (Fri)	1,060
		EXAM-2021-00228	11 Aug 2022 (Thu)	19:00 – 21:30	8 Jul 2022 (Fri)	1,060
Insurance and Retirement Planning (Credit: 20)	4	EXAM-2021-00334	21 Apr 2022 (Thu)	19:00 – 21:30	18 Mar 2022 (Fri)	1,060
		EXAM-2021-00335	26 May 2022 (Thu)	19:00 – 21:30	22 Apr 2022 (Fri)	1,060
Investment and Asset Management: Product Solutions (Credit: 20)	5	EXAM-2020-00317	23 Mar 2022 (Wed)	19:00 – 21:30	18 Feb 2022 (Fri)	1,060
		EXAM-2021-00197	17 May 2022 (Tue)	19:00 – 21:30	8 Apr 2022 (Fri)	1,060
		EXAM-2021-00210	21 Jun 2022 (Tue)	19:00 – 21:30	20 May 2022 (Fri)	1,060
Investment and Asset Management: Alternatives and Wealth Solutions (Credit: 20)	6	EXAM-2021-00183	29 Mar 2022 (Tue)	19:00 – 21:30	25 Feb 2022 (Fri)	1,060
		EXAM-2021-00199	19 May 2022 (Thu)	19:00 – 21:30	8 Apr 2022 (Fri)	1,060
		EXAM-2021-00212	23 Jun 2022 (Thu)	19:00 – 21:30	20 May 2022 (Fri)	1,060
		EXAM-2021-00223	14 Jul 2022 (Thu)	19:00 – 21:30	10 Jun 2022 (Fri)	1,060
Financial Planning and Wealth Management (Credit: 20)	7	(Multiple Choice) EXAM-2020-00306	22 Apr 2022 (Fri)	19:00 – 20:15	25 Mar 2022 (Fri)	1,060 ⁹
		(Case & Oral) ⁸ EXAM-2020-00161	24 Apr 2022 (Sun)	TBC	25 Mar 2022 (Fri)	
		(Case & Oral) ⁸ EXAM-2021-00336 (For resit only)	29 May 2022 (Sun)	TBC	29 Apr 2022 (Fri)	1,060 ⁹
		(Case & Oral) ⁸ EXAM-2021-00337 (For resit only)	12 Jun 2022 (Sun)	TBC	13 May 2022 (Fri)	1,060 ⁹
		(Multiple Choice) EXAM-2021-00338	24 Jun 2022 (Fri)	19:00 – 20:15	20 May 2022 (Fri)	1,060 ⁹
		(Case & Oral) ⁸ EXAM-2021-00340	26 Jun 2022 (Sun)	TBC	20 May 2022 (Fri)	


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

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 CB (Stage I), CB (Stage II), CB, CFMP, ARWP, CRWP, ACsP,ACRP, CCRP(CL) and CCRP(CPM) are eligible to claim HKIB CPD hours.
3	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 .
4	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.
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 HKD500 (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 HKD1,060 respectively.
10	Others	HKIB reserves the right to cancel, modify, and/or postpone the training and/or examination.

For General Enquiries / Feedback:

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