

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: Q3 2022


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	HQR003PP220701 FLEX Learning – Virtual Classroom	8 Jul 2022 (Fri)	19:00 – 22:00	Cantonese	23 Jun 2022 (Thu)	3,900
			15 Jul 2022 (Fri)				
			22 Jul 2022 (Fri)				
			29 Jul 2022 (Fri)				
Investment and Asset Management: Product Solutions (Credit: 20)	5	HQR005PP220801 FLEX Learning – Virtual Classroom	2 Aug 2022 (Tue)	19:00 – 22:00	Cantonese	19 Jul 2022 (Tue)	3,900
			9 Aug 2022 (Tue)				
			16 Aug 2022 (Tue)				
			23 Aug 2022 (Tue)				
Investment and Asset Management: Alternatives and Wealth Solutions (Credit: 20)	6	HQR006PP220901 FLEX Learning – Virtual Classroom	2 Sep 2022 (Fri)	19:00 – 22:00	Cantonese	19 Aug 2022 (Fri)	3,900
			9 Sep 2022 (Fri)				
			16 Sep 2022 (Fri)				
			23 Sep 2022 (Fri)				
Financial Planning and Wealth Management (Credit: 20)	7	HQR007PP220901 FLEX Learning – Virtual Classroom	3 Sep 2022 (Sat)	3 Sep & 10 Sep 10:00 – 13:00; 14:00 – 17:00	Cantonese	22 Aug 2022 (Mon)	3,900
			10 Sep 2022 (Sat)				
			17 Sep 2022 (Sat)				
				17 Sep 10:00 – 13:00			

Examination: Q3 – Q4 2022

Module Name	Module No.	Code	Date	Time	Application Deadline ⁵	Fee ⁶ (HKD)
Essentials of Banking (Credit: 20)	3	EXAM-2021-00228	11 Aug 2022 (Thu)	19:00 – 21:30	8 Jul 2022 (Fri)	1,060
		EXAM-2021-00237	20 Sep 2022 (Tue)	19:00 – 21:30	19 Aug 2022 (Fri)	1,060
Investment and Asset Management: Product Solutions (Credit: 20)	5	EXAM-2021-00229	18 Aug 2022 (Thu)	19:00 – 21:30	15 Jul 2022 (Fri)	1,060
		EXAM-2021-00243	18 Oct 2022 (Tue)	19:00 – 21:30	16 Sep 2022 (Fri)	1,060
		EXAM-2021-00252	25 Nov 2022 (Fri)	19:00 – 21:30	25 Oct 2022 (Tue)	1,060

Investment and Asset Management: Alternatives and Wealth Solutions (Credit: 20)	6	EXAM-2021-00230	25 Aug 2022 (Thu)	19:00 – 21:30	22 Jul 2022 (Fri)	1,060
		EXAM-2021-00245	20 Oct 2022 (Thu)	19:00 – 21:30	16 Sep 2022 (Fri)	1,060
Financial Planning and Wealth Management (Credit: 20)	7	(Multiple Choice) EXAM-2021-00344	23 Sep 2022 (Fri)	19:00 – 20:15	19 Aug 2022 (Fri)	1,060 ⁹
		(Case & Oral) ^a EXAM-2021-00345	25 Sep 2022 (Sun)	TBC	19 Aug 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 ACRP, CCRP(CL), CCRP(CPM), ACsP, AORP, CORP, ARWP, CRWP, CB (Stage I), CB (Stage II), CB and CFMP 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 . - WAM Pilot Programme will be closing on 31 March 2023. All eligible trainings (including all individual sessions) must be completed by 31 August 2022.
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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