

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

### Important Notes:

- HKIB has been appointed as the Professional Qualification Assessment Agency effective from 1 August 2020.
- 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

### Training: Q4 2022


 IA CPD<sup>1</sup>

 HKIB CPD<sup>2</sup>


SFC CPT


 FLEX Learning<sup>3</sup>

Module Name	Module No.	Code	Date	Time	Language (Supplemented with English materials)	Application Deadline <sup>4</sup>	Fee <sup>5,6</sup> (HKD)
Essentials of Banking (Credit: 20)	3	HQRM003PP221001 FLEX Learning – Virtual Classroom	3 Oct 2022 (Mon) 10 Oct 2022 (Mon) 17 Oct 2022 (Mon) 24 Oct 2022 (Mon) 31 Oct 2022 (Mon)	19:00 – 22:00	Cantonese	19 Sep 2022 (Mon)	3,900
Investment and Asset Management: Product Solutions (Credit: 20)	5	HQRM005PP221101 FLEX Learning – Virtual Classroom	3 Nov 2022 (Thu) 10 Nov 2022 (Thu) 17 Nov 2022 (Thu) 24 Nov 2022 (Thu) 1 Dec 2022 (Thu)	19:00 – 22:00		20 Oct 2022 (Thu)	3,900
Investment and Asset Management: Alternatives and Wealth Solutions (Credit: 20)	6	HQRM006PP221201 FLEX Learning – Virtual Classroom	2 Dec 2022 (Fri) 9 Dec 2022 (Fri) 16 Dec 2022 (Fri) 23 Dec 2022 (Fri) 30 Dec 2022 (Fri)	19:00 – 22:00		18 Nov 2022 (Fri)	3,900
Financial Planning and Wealth Management (Credit: 20)	7	HQRM007PP221201 FLEX Learning – Virtual Classroom	15 Dec 2022 (Thu) 21 Dec 2022 (Wed) 29 Dec 2022 (Thu) 5 Jan 2023 (Thu) 12 Jan 2023 (Thu)	19:00 – 22:00		1 Dec 2022 (Thu)	3,900

### Examination: Q4 2022

Module Name	Module No.	Code	Date	Time	Application Deadline <sup>4</sup>	Fee <sup>5</sup> (HKD)
Essentials of Banking (Credit: 20)	3	EXAM-2020-00266	31 Oct 2022 (Mon)	19:00 – 21:30	30 Sep 2022 (Fri)	1,060
		EXAM-2021-00257	23 Nov 2022 (Wed)	19:00 – 21:30	21 Oct 2022 (Fri)	1,060
		EXAM-2021-00377	20 Dec 2022 (Tue)	19:00 – 21:30	21 Nov 2022 (Mon)	1,060
Investment and Asset Management: Product Solutions (Credit: 20)	5	EXAM-2021-00243	18 Oct 2022 (Tue)	19:00 – 21:30	16 Sep 2022 (Fri)	1,060
		EXAM-2021-00252	15 Nov 2022 (Tue)	19:00 – 21:30	14 Oct 2022 (Fri)	1,060
		EXAM-2021-00279	14 Dec 2022 (Wed)	19:00 – 21:30	14 Nov 2022 (Mon)	1,060

<b>Investment and Asset Management: Alternatives and Wealth Solutions (Credit: 20)</b>	6	<b>EXAM-2021-00245</b>	20 Oct 2022 (Thu)	19:00 – 21:30	16 Sep 2022 (Fri)	1,060
		<b>EXAM-2021-00253</b>	17 Nov 2022 (Thu)	19:00 – 21:30	17 Oct 2022 (Mon)	1,060
		<b>EXAM-2021-00281</b>	16 Dec 2022 (Fri)	19:00 – 21:30	15 Nov 2022 (Tue)	1,060
<b>Financial Planning and Wealth Management (Credit: 20)</b>	7	(Multiple Choice) <b>EXAM-2021-00248</b>	28 Oct 2022 (Fri)	19:00 – 20:15	30 Sep 2022 (Fri)	1,060 <sup>8</sup>
		(Case & Oral) <sup>7</sup> <b>EXAM-2021-00249</b>	30 Oct 2022 (Sun)	TBC	30 Sep 2022 (Fri)	
	7	(Multiple Choice) <b>EXAM-2021-00347</b>	25 Nov 2022 (Fri)	19:00 – 20:15	25 Oct 2022 (Tue)	1,060 <sup>8</sup>
		(Case & Oral) <sup>7</sup> <b>EXAM-2021-00348</b>	27 Nov 2022 (Sun)	TBC	27 Oct 2022 (Thu)	

**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](mailto: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	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	Late Application	A late entry fee of HKD200 will apply for late training and examination enrolment respectively.
5	Fee Discount	HKIB student members can enjoy 25% off training fee discount and 50% off examination fee discount respectively.
6	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.
7	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.
8	Examination (Fee)	The re-sitting examination fees for M7 Multiple Choice and M7 Case & Oral are HKD1,060 respectively.
9	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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