

## Affiliate Designation – CB Affiliate and ECF Affiliate

### Frequently Asked Questions

#### 1. Who are eligible for the Affiliate Designation?

The following categories of individuals are eligible for the Affiliate Designation:

- Non-current Relevant Practitioners in the banking industry (as defined by the HKMA) including but not limited to:
  - *Full-time post-secondary students*
  - *Current banking practitioners in non-relevant job roles*
  - *Practitioners in non-banking fields*
  - *Banking practitioners previously deemed as Relevant Practitioners but who have changed to non-relevant job roles or currently not under banking employment / retired*
- Current Relevant Practitioners in the banking industry (as defined by the HKMA) who do not possess sufficient relevant working experience for certification requirements.

#### 2. How can I apply for the Affiliate Designation?

Learners who have successfully completed any HKIB CB or ECF programme **will automatically be granted** the designation of “CB Affiliate” or “ECF Affiliate” respectively. No separate application is required.

For holders of HKIB Programme Diplomas or Certificates:

- **Awarded between January 2024 and July 2025:** The Affiliate Designation will be granted automatically by the end of August 2025.
- **Awarded before January 2024:** A formal application is required.

For Professional Qualification (PQ) holders who do not meet the recertification requirements (e.g. no longer an RP due to a change in job role, departure from the banking industry, or retirement) and wish to maintain their affiliation with HKIB, **an application must be submitted.**

Please click [here](#) to access the “Certification Application Form for Affiliation Designation”.

### 3. What is the fee for the Affiliate Designation?

The fee for the Affiliate Designation varies depending on your membership status as well as the qualification you hold—either a Professional Qualification Programme Diploma/Certificate or a Professional Qualification Scroll.

Please refer to the latest [fee table](#) for detailed information.

### 4. Is renewal required for the Affiliate Designation?

Renewal requirements vary depending on your membership status:

- **Ordinary Members**

To renew your Affiliate Designation(s), you must:

- Accumulate a minimum of **3 HKIB CPD hours** in the previous calendar year.
- Pay the **annual recertification (Affiliate) fee**.

***Note:** Full-time students are exempt from the certification fee until 31 December of their graduation year.*

- **Professional Members**

To maintain your designation(s), you must:

- Submit a **CPD declaration** and confirm your **RP status** (if applicable).
- Pay the **annual recertification (PQ) fee**.

### 5. I have completed the HKIB CB/ECF programme and received the Programme Diploma/Certificate. When will I receive the Affiliate Scroll?

If you completed the HKIB CB/ECF programme and were awarded the Programme Diploma/Certificate during January 2024 to July 2025, you would receive the corresponding Affiliate Designations by the **end of August 2025**. You will also be **listed in the Registers of Certified Individuals (CI)** and **receive a digital Affiliate Scroll** by that time.

From **August 2025 onwards**, upon completion of the HKIB CB/ECF programme, you will receive the Affiliate Designation within **one month** of the issuance of the result slip for your final examination.

**6. I am currently a Professional Qualification (PQ) holder but no longer a Relevant Practitioner (RP), am I still eligible for the Affiliate Designation?**

Yes. If you have already paid the PQ certification fee for the current calendar year, you may apply to convert can apply to convert your PQ status to Affiliate Designation.

If you have not paid the PQ certification fee for the year but still wish to switch Affiliate Designation, you may do so by paying **a one-off administrative fee of HKD600** along with the Affiliate certification fee.

**Please note:** If you do not hold any other Professional Qualifications, your membership status will be updated from Professional Member to Ordinary Member upon being granted the Affiliate Designation.

**7. If I was previously a Professional Qualification holder, am I eligible for the Affiliate Designation?**

Yes, you are eligible. You may obtain Affiliate Designation by applying for Affiliate Designation and paying the Affiliate certification fee. However, if you wish to maintain your existing Professional Qualifications, you should renew your status as a Professional Member and pay the respective PQ certification fee.

**8. If I was a default Professional Member, can I still apply for the Affiliate Designation?**

Yes, you are eligible to apply for reinstatement. To do so, you may pay a **re-instatement fee of HKD2,000**, along with the Affiliate certification fee to obtain the Affiliate Designation.

To renew the Affiliate Designation, you are required to:

- Accumulate a minimum of **3 HKIB CPD hours** in the previous calendar year, and
- Pay the **annual Affiliate certification fee**.

**9. As an Affiliate Designation holder, how can I progress to become a Professional Qualification (PQ) holder?**

Once you have fulfilled the outstanding requirements, such as obtaining Relevant Practitioner status or acquiring sufficient relevant work experience, you may apply to articulate to a CB or ECF Professional Qualification holder.

## 10. How are the CB/ECF Affiliate Designations recognised by regulators and banks?

Similar to CB/ECF Professional Qualifications, the Affiliate Designations are well recognised by both **regulators and banks**. These designations are awarded to encourage practitioners to continue their professional development through **reskilling or upskilling**, in line with regulatory guidance. This initiative supports the ongoing development of talent and contributes to the sustainable growth of the banking industry.

## 11. Do the required three HKIB CPD hours have to be earned through HKIB activities only?

No. As an Affiliate Designation holder, you can fulfil the three HKIB CPD hours requirement through a variety of activities, not limited to those organised by HKIB. Eligible activities include, but are not limited to:

- CPD/CPT courses organised by other **recognised professional bodies**.
- **Academic studies**, such as local or overseas bachelor's or postgraduate degrees in disciplines relevant to the scope of qualified CPD activities.

For more details, please refer to **Section 3.1 of Overview of HKIB CPD Scheme** available on our website.

## 12. How can the public or HR professionals verify my status as an Affiliate Designation Holder?

The public and HR professionals can verify your Affiliate Designation through the following platforms:

- [Registers of Certified Individuals \(CI\)](#).
  - Display your Affiliate Designation (e.g. CB Affiliate or ECF Affiliate).
- [Digital Credential Verifier](#)
  - Provides more detailed information, including your Affiliate Scroll and the validity period of your Affiliate Designation.

**13. I am currently a Student Member. If I am granted the Affiliate Designation and become an Ordinary Member, will I still be entitled to Student Member benefits?**

Yes. If you are a full-time student, you will continue to enjoy Ordinary Member benefits while also remaining eligible for Student Member privileges until graduation year. These include, but are not limited to, discounted rates for enrolling in HKIB PQP training and examination. For full details, please refer to the Benefits & Services on our website.

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