HKIB The Hong Kong Institute of Bankers | CERTIFIED BANKER

Proudly Appointed As **Professional Qualifications Assessment Agency (PQAA)**

資歷架構 Qualifications Framework

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

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#).

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 31/07/2030
#Recognised under the QF at Level 5, QR Registration No.: 20/000539/L5, Validity Period from 01/08/2020 to 31/07/2030

Training[1]: 2026

IA CPD[2] HKIB CPD[3] SFC CPT FLEX Learning[4]

Module Name	Module No.	Code	Date	Time	Language (Supplemented with **English** materials)	Application Deadline[6]	Fee[6,7] (HKD)
Essentials of Banking (Credit: 20)	3	**THERW03P26031** **FLEX Learning – Virtual Classroom**	4 Mar 2026 (Wed) 11 Mar 2026 (Wed) 18 Mar 2026 (Wed) 25 Mar 2026 (Wed) 1 Apr 2026 (Wed)	19:00 – 22:00	Cantonese	13 Feb 2026 (Fri)	4,500
		THERW03P26061 **FLEX Learning – Virtual Classroom**	10 Jun 2026 (Wed) 17 Jun 2026 (Wed) 24 Jun 2026 (Wed) 2 Jul 2026 (Thu) 8 Jul 2026 (Wed)	19:00 – 22:00	Cantonese	27 May 2026 (Wed)	4,500
		THERW03P26091 **FLEX Learning – Virtual Classroom**	5 Sep 2026 (Sat)	14:00 – 17:00	Cantonese	24 Aug 2026 (Mon)	4,500
			12 Sep 2026 (Sat) 19 Sep 2026 (Sat)	10:00 – 13:00 & 14:00 – 17:00			
Investment and Asset Management: Product Solutions (Credit: 20)	5	**THERW05P26031** **FLEX Learning – Virtual Classroom**	19 Mar 2026 (Thu) 26 Mar 2026 (Thu) 2 Apr 2026 (Thu) 9 Apr 2026 (Thu) 16 Apr 2026 (Thu)	19:00 – 22:00	Cantonese	5 Mar 2026 (Thu)	4,500
		THERW05P26081 **FLEX Learning – Virtual Classroom**	8 Aug 2026 (Sat) 15 Aug 2026 (Sat)	10:00 – 13:00 & 14:00 – 17:00	Cantonese	24 Jul 2026 (Fri)	4,500
			22 Aug 2026 (Sat)	10:00 – 13:00			
Investment and Asset Management: Alternatives and Wealth Solutions (Credit: 20)	6	**THERW06P26061** **FLEX Learning – Virtual Classroom**	13 Jun 2026 (Sat) 27 Jun 2026 (Sat)	10:00 – 13:00 & 14:00 – 17:00	Cantonese	1 Jun 2026 (Mon)	4,500
			4 Jul 2026 (Sat)	10:00 – 13:00			
Financial Planning and Wealth Management (Credit: 20)	7	**THERW07P26091** **Face-to-face Training**	30 Sep 2026 (Wed) 8 Oct 2026 (Thu) 15 Oct 2026 (Thu) 22 Oct 2026 (Thu) 29 Oct 2026 (Thu)	19:00 – 22:00	Cantonese	26 Aug 2026 (Wed)	4,500

Examination[1]: 2026

Candidates are suggested to select the most appropriate examination session according to their competence level and learning plan, including self-studying time to prepare for the examination.

Module Name	Module No.	Code	Date	Time	Application Deadline[5]	Fee (HKD)[6]
Essentials of Banking (Credit: 20)	3	**EXAM-2025-0139**	6 Jan 2026 (Tue)	19:00 - 21:30	6 Dec 2025 (Sat)	1,300
		EHERW03P26041	30 Apr 2026 (Thu)	19:00 - 21:30	30 Mar 2026 (Mon)	1,300

Essentials of Banking (Credit: 20)	3	**EHERW03P26081**	4 Aug 2026 (Tue)	19:00 - 21:30	4 Jul 2026 (Sat)	1,300
		EHERW03P26111	3 Nov 2026 (Thu)	19:00 - 21:30	3 Oct 2026 (Sat)	1,300
Investment and Asset Management: Product Solutions (Credit: 20)	5	**EHERW05P26051**	13 May 2026 (Wed)	19:00 - 21:30	13 Apr 2026 (Mon)	1,300
		EHERW05P26091	24 Sep 2026 (Thu)	19:00 - 21:30	24 Aug 2026 (Mon)	1,300
Investment and Asset Management: Alternatives and Wealth Solutions (Credit: 20)	6	**EHERW06P26081**	6 Aug 2026 (Thu)	19:00 - 21:30	6 Jul 2026 (Mon)	1,300
Financial Planning and Wealth Management (Credit: 20)	7	(Multiple Choice) **EHERW07P26111**	27 Nov 2026 (Fri)	19:00 – 20:15	27 Oct 2026 (Tue)	600
		(Case & Oral)[8,9] **EHERM07P26112**	29 Nov 2026 (Sun)	10:00 – 18:00[9]	29 Oct 2026 (Thu)	1,300

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	:	Applicants can submit the application via MyHKIB in advance at most 6 months before.

Notes:

Note	Category	Details
1	**Others**	- HKIB reserves the right to cancel, change, and/or postpone the training and/or examination schedule.
2 & 3	**CPD**	- IA CPD will be applicable to Modules 3, 5, 6 & 7 only By attending the above training, Professional Qualification holders of ARWP, CRWP, ACsP, AORP, CORP, ACOP, CCOP(GC), CCOP(IIC), ACRP, CCRP(CL), CCRP(CPM), CPFinT(A), CPFinT(M), CPFinT(S-AIBD), CPFinT(S-DLT), CPFinT(S-OBAPI), CPFinT(S-RT), AGFP(PS), AGFP(ClimRM), AGFP(SDR), AGFP(SSCC), CGFP(GSF-P), CGFP(GSF-I), CGFP(SRM), CGFP(SDR), CGFP(SSCC), CB (Stage I), CB (Stage II), CB, and CFMP are eligible to claim HKIB CPD hours.
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 HKD600 (including delivery fee) on request by learners.
8	**Examination (Time)**	Exam candidates of M7 Case & Oral will be informed of the actual exam time via Exam Attendance Notice. Exam candidatesare recommended to reserve the day.
9	**Examination Language**	The written financial plan must be submitted in English or Chinese (Traditional or Simplified), and the same language must be used throughout the entire paper.

For General Enquiries / Feedback:

Address: 3/F Guangdong Investment Tower, 148 Connaught Road Central, Hong Kong (Sheung Wan MTR Station Exit C)

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