

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

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 31/07/2030

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

Training¹: 2026

Module Name	Module No.	Code	Date	Time	Language (Supplemented with English materials)	Application Deadline ⁴	Fee ^{5,6} (HKD)
Essentials of Banking (Credit: 20)	3	THERW03P26031 FLEX Learning – Virtual Classroom	4 Mar 2026 (Wed)	19:00 – 22:00	Cantonese	CLOSED	4,500
			11 Mar 2026 (Wed)				
			18 Mar 2026 (Wed)				
			25 Mar 2026 (Wed)				
			1 Apr 2026 (Wed)				
		THERW03I26041 Face-to-face Training	2 Apr 2026 (Thu)	9:30 - 12:30 & 14:00 - 17:00	Cantonese	CLOSED	4,500
			8 Apr 2026 (Wed)	14:00 - 17:00			
		THERW03I26042 Face-to-face Training	16 Apr 2026 (Thu)	9:30 - 12:30	Cantonese	CLOSED	4,500
			22 Apr 2026 (Wed)	9:30 - 12:30 & 14:00 - 17:00			
		THERW03I26051 Face-to-face Training	28 Apr 2026 (Tue)	14:00 - 17:00	Cantonese	CLOSED	4,500
			19 May 2026 (Tue)	9:30 - 12:30			
Investment and Asset Management: Product Solutions (Credit: 20)	5	THERW03I26052 FLEX Learning – Virtual Classroom	6 May 2026 (Wed)	9:30 - 12:30 & 14:00 - 17:00	Cantonese	CLOSED	4,500
			13 May 2026 (Wed)	14:00 - 17:00			
			18 May 2026 (Mon)	9:30 - 12:30			
			6 Jun 2026 (Sat)	9:30 - 12:30			
			6 Jun 2026 (Sat)	14:00 - 17:00			
		THERW03P26061 FLEX Learning – Virtual Classroom	13 Jun 2026 (Sat)	14:00 - 17:00	Cantonese	CLOSED	4,500
			27 Jun 2026 (Sat)	9:30 - 12:30			
			27 Jun 2026 (Sat)	14:00 - 17:00			
			10 Jun 2026 (Wed)	19:00 – 22:00			
			17 Jun 2026 (Wed)	19:00 – 22:00			
Investment and Asset Management: Alternatives and Wealth Solutions (Credit: 20)	6	THERW03P26091 FLEX Learning – Virtual Classroom	24 Jun 2026 (Wed)	19:00 – 22:00	Cantonese	CLOSED	4,500
			2 Jul 2026 (Thu)	19:00 – 22:00			
			8 Jul 2026 (Wed)	19:00 – 22:00			
			5 Sep 2026 (Sat)	10:00 – 13:00			
			12 Sep 2026 (Sat)	10:00 – 13:00 & 14:00 – 17:00			
		THERW05P26031 FLEX Learning – Virtual Classroom	19 Sep 2026 (Sat)	14:00 – 17:00	Cantonese	24 Aug 2026 (Mon)	4,500
			26 Mar 2026 (Thu)	19:00 – 22:00			
			2 Apr 2026 (Thu)	19:00 – 22:00			
			9 Apr 2026 (Thu)	19:00 – 22:00			
			16 Apr 2026 (Thu)	19:00 – 22:00			
		THERW05P26081 FLEX Learning – Virtual Classroom	8 Aug 2026 (Sat)	10:00 – 13:00 & 14:00 – 17:00	Cantonese	CANCELLED	4,500
			15 Aug 2026 (Sat)	14:00 – 17:00			
			22 Aug 2026 (Sat)	10:00 – 13:00			
			7 Oct 2026 (Wed)	09:30 – 12:30 & 14:30 – 17:30			
			13 Oct 2026 (Tue)	14:30 – 17:30			
		(NEW!!!) THERW05I26101 Face-to-face Training	20 Oct 2026 (Tue)	14:30 – 17:30	Cantonese	22 Sep 2026 (Tue)	4,500
			13 Jun 2026 (Sat)	10:00 – 13:00 & 14:00 – 17:00			
			27 Jun 2026 (Sat)	14:00 – 17:00			
			4 Jul 2026 (Sat)	10:00 – 13:00			
			13 Jun 2026 (Sat)	10:00 – 13:00 & 14:00 – 17:00			
		(NEW!!!) THERW06I26121 Face-to-face Training	27 Jun 2026 (Sat)	14:00 – 17:00	Cantonese	CLOSED	4,500
			4 Jul 2026 (Sat)	10:00 – 13:00			
			4 Dec 2026 (Fri)	09:30 – 12:30 & 14:30 – 17:30			
			10 Dec 2026 (Thu)	14:30 – 17:30			
			18 Dec 2026 (Fri)	14:30 – 17:30			

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	9 Sep 2026 (Wed)	4,500
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Examination¹: 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 ⁴	Fee (HKD) ⁵
Essentials of Banking (Credit: 20)	3	EXAM-2025-0139	6 Jan 2026 (Tue)	19:00 - 21:30	CLOSED	1,300
		EHERW03P26041	30 Apr 2026 (Thu)	19:00 - 21:30	CLOSED	1,300
		EHERW03I26061	6 Jun 2026 (Sat)	16:00 - 18:30	CLOSED	1,300
		EHERW03P26081	4 Aug 2026 (Tue)	19:00 - 21:30	CLOSED	1,300
		EHERW03P26111	3 Nov 2026 (Tue)	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	CLOSED	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	CLOSED	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 EHERW07P26112	29 Nov 2026 (Sun)	10:00 – 18:00 ⁷	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:
 - 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.
 - 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-OBAP), 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	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 HKD600 (including delivery fee) on request by learners.
7	Examination (Time)	Exam candidates of M7 Case & Oral will be informed of the actual exam time via Exam Attendance Notice. Exam candidates are recommended to reserve the day.
8	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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