

CPWPA Online Platform

CPWP Associate Certification Application User Guide for Applicant

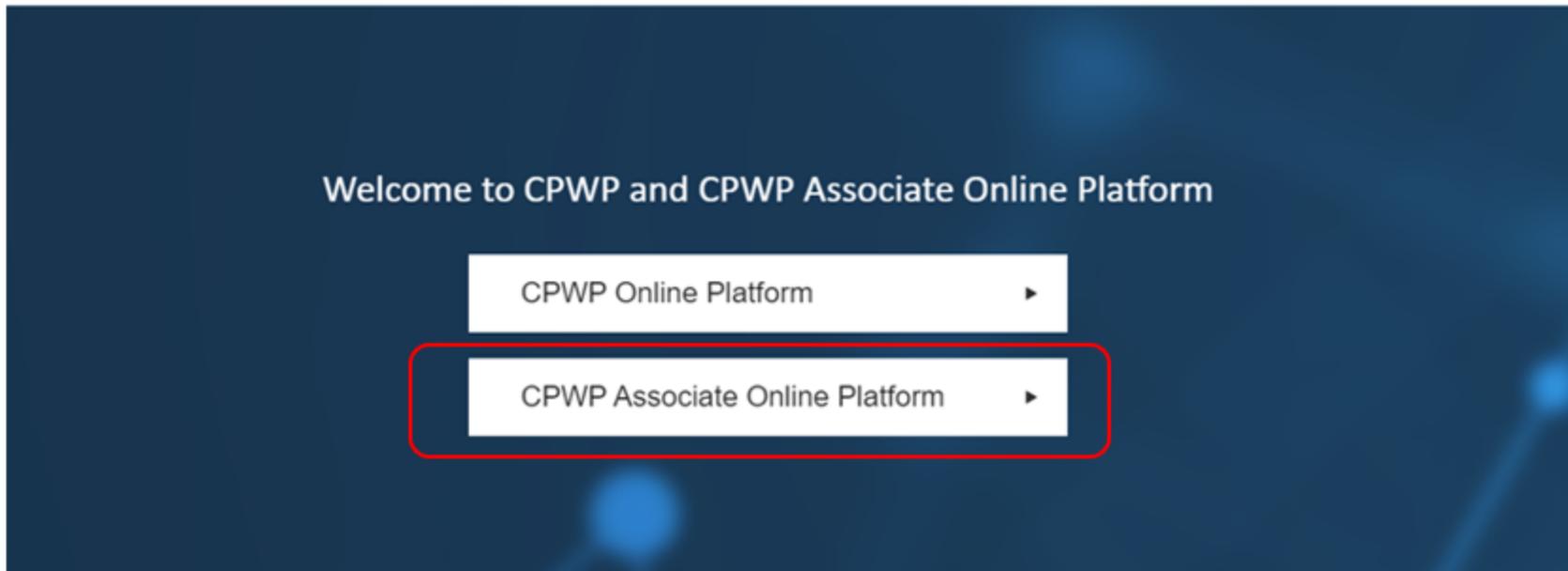
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1. New Application Process

Registration

- “Register” as new applicant via CPWP Associate Online Platform (www.pwma-cpwponline.com)



2. New Application Process

Requirements for CPWPA certification

- Read the "Requirements for CPWP Associate" carefully before applying for CPWP Associate

The screenshot displays a web application interface for the Private Wealth Management Association (PWMA). A modal window titled "Requirements for CPWP Associate certification:" is open, providing the following information:

The below conditions must be met before applying for CPWP Associate certification:

1. Must be currently employed by a member institution AND involved with the Private Wealth Management business; and
2. Passed all examination papers for both Module 1 and Module 2. The result of each examination paper is valid for 5 years (counting from the date of the examination) for the purpose of applying for CPWPA certification.

An individual who has met the above is eligible to apply for CPWP Associate certification, but such application should be received by PWMA not later than 3 months from the end of the validity period of the examination result.

The background of the application shows a "Member Firm list" dropdown menu and "Back" and "Next" navigation buttons.

3. New Application Process

Registration (Cont'd)

- “Register” as new applicant at the CPWP Associate User Login page by clicking [Register]

PWMA Private Wealth Management Association

CPWPFA
Certified Private Wealth Professional Associate
註冊私人財富管理師

CPWP Associate User Login

Email Address

Password

Verification code **8 R 3 7** Refresh

Remember Me

Submit

[Forgot Password?](#) [Back](#)

Do not have an existing applicant login with us?
[Register](#) is a new applicant now.

4. New Application Process

Registration (Cont'd)

- Applicant chooses your Current Employer from the Member Firm list

The screenshot shows a registration form titled "Register as New Applicant". The form is set against a teal background. At the top left, there are logos for PWMA (Private Wealth Management Association) and CRWPA (Certified Private Wealth Professional Associate / 註冊私人財富副管理師). The main content of the form includes the heading "Register as New Applicant", followed by the prompt "Your Current Employer is:". Below this is a dropdown menu with "Member Firm list" selected. At the bottom of the form, there are two buttons: "Back" with a left arrow and "Next" with a right arrow.

5. New Application Process

Registration (Cont'd)

- Applicant selects a Member Firm from the pulldown menu

The screenshot displays a web form titled "Register as New Applicant". At the top left, there are logos for PWMA (Private Wealth Management Association) and CRWPA (Certified Private Wealth Professional Associate). Below the logos, the form contains a section labeled "Your Current Employer is:" followed by a pulldown menu. The menu is open, showing a list of member firms. The list includes:

- Member Firm list
- Bank J. Safra Sarasin Ltd.
- Bank Julius Baer & Co. AG
- Bank of China (Hong Kong) Limited
- Bank of China International Limited
- Bank of Communications (Hong Kong) Limited
- Bank of Singapore Limited
- BNP Paribas Hong Kong branch
- CA Indosuez (Switzerland) SA, Hong Kong Branch
- China CITIC Bank International Limited
- China Minsheng Banking Corp., Ltd. Hong Kong Branch
- Chong Hing Bank Limited
- Citibank, N.A.
- Citigold Private Client, Citibank (Hong Kong) Limited
- CMS Wing Lung Bank Limited
- Credit Suisse AG, Hong Kong Branch
- CTBC Bank Co., Ltd.
- Dah Sing Bank, Limited
- DBS Bank (Hong Kong) Limited
- Deutsche Bank AG, Hong Kong Branch
- Dah Sing Bank, Limited
- DBS Bank (Hong Kong) Limited
- Deutsche Bank AG, Hong Kong Branch
- East West Bank, Hong Kong Branch
- EFG Bank AG
- Goldman Sachs (Asia) L.L.C.
- Hang Seng Bank Limited
- Industrial and Commercial Bank of China (Asia) Limited
- JP Morgan Chase Bank, National Association
- LGT Bank AG, Hong Kong Branch
- Member firm test 1
- Member Firm Test 2
- Morgan Stanley Bank Asia Limited
- Nomura International (Hong Kong) Limited
- OCBC Wing Hang Bank Limited
- Pictet & Cie (Europe) S.A.
- Royal Bank of Canada, Hong Kong Branch
- Shanghai Pudong Development Bank Co., Ltd., Hong Kong Branch
- Standard Chartered Bank (Hong Kong) Limited
- The Bank of East Asia, Limited

6. New Application Process

Registration (Cont'd)

- Applicant fill out the required personal information under [Personal Particulars]



Private Wealth
Management
Association



Certified Private Wealth Professional Associate
註冊私人財富副管理師

Register as New Applicant >

1 Personal Particulars

2 Identity Information

3 Employment Information

■ Personal Particulars

Title *: Dr Mr. Mrs. Ms

Family Name *:
(Remark: The name should match your HKID/passport record.)

Given Name *:
(Remark: The name should match your HKID/passport record.)

Date of Birth *:

Work Email *:

Personal Email :

Contact No. *: Office * Mobile * Home(Optional)

Correspondence Address *:

Next ➔

7. New Application Process

Registration (Cont'd)

- Applicant completes [Identity Information]

The screenshot displays a registration form titled "Register as New Applicant" with a right-pointing arrow. At the top left, there are logos for PWMA (Private Wealth Management Association) and CRWPA (Certified Private Wealth Professional Associate / 註冊私人財富管理師). Below the title, a progress bar shows three steps: 1 Personal Particulars, 2 Identity Information (highlighted in green), and 3 Employment Information. Under the "Identity Information" section, there are two input fields: "First 4 digits of HKID Card Number *:" and "First 4 digits of Passport Number: (If no HKID Card)". At the bottom right, there are two buttons: "← Previous" and "Next →".

8. New Application Process

Registration (Cont'd)

- Applicant selects a Functional Title from the pulldown menu under [Employment Information] and check all boxes to confirm the declaration statements before clicking “Submit”

The screenshot displays the PWMA registration interface. At the top, the PWMA logo and the CRWPA logo (Certified Private Wealth Professional Associate) are visible. The main heading is "Register as New Applicant". Below this, there are three numbered steps: 1. Personal Particulars, 2. Identity Information, and 3. Employment Information. The "Employment Information" step is currently active and highlighted in green. The form fields include: "Company Name" with the value "UAT MEMBER FIRM"; "Business Unit *" with an empty text input field; and "Functional Title" with a dropdown menu showing "Please Select". Below the form fields, there are three checkboxes for confirmation: "I confirm that all information provided above is true and correct.", "I understand that all the information provided above and for My Application will be accessible by my company and my future PWMA-member-firm employer.", and "By creating an account with PWMA, you agree to abide by the PWMA Privacy Policy and website Terms and Conditions." At the bottom right, there are two buttons: "Previous" and "Submit".

9. New Application Process

Registration (Cont'd)

- Applicant receives “Your account has been created successfully” prompt

The screenshot shows a web page for PWMA (Private Wealth Management Association) and CPWPA (Certified Private Wealth Professional Associate). The page title is "Register as New Applicant". A green notification bar at the top states "Your account has been created successfully". Below this, a large green checkmark is displayed next to the text: "You shall receive a confirmation message in your primary email inbox shortly, with your user login and password." At the bottom of the page, there is a button labeled "Back to Mainpage" with a right-pointing arrow.

10. New Application Registration

Registration (Cont'd)

- Applicant receives an email of “Welcome to Certified Private Wealth Professional (CPWP) Associate Account Registration

Dear Applicant,

Thank you for registering to the CPWP Associate Online Application Platform.

Your account has been created successfully.

You can now login to your account to access the online application form via <https://www.pwma-cpwponline.com> with the following username and password:

Username : Applicant@MemberFirm.com.hk

Password : XXXXXX

Yours sincerely,
Private Wealth Management Association Limited

Please do not reply to this e-mail. For questions, please email to ECFonline@pwma.org.hk

11. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

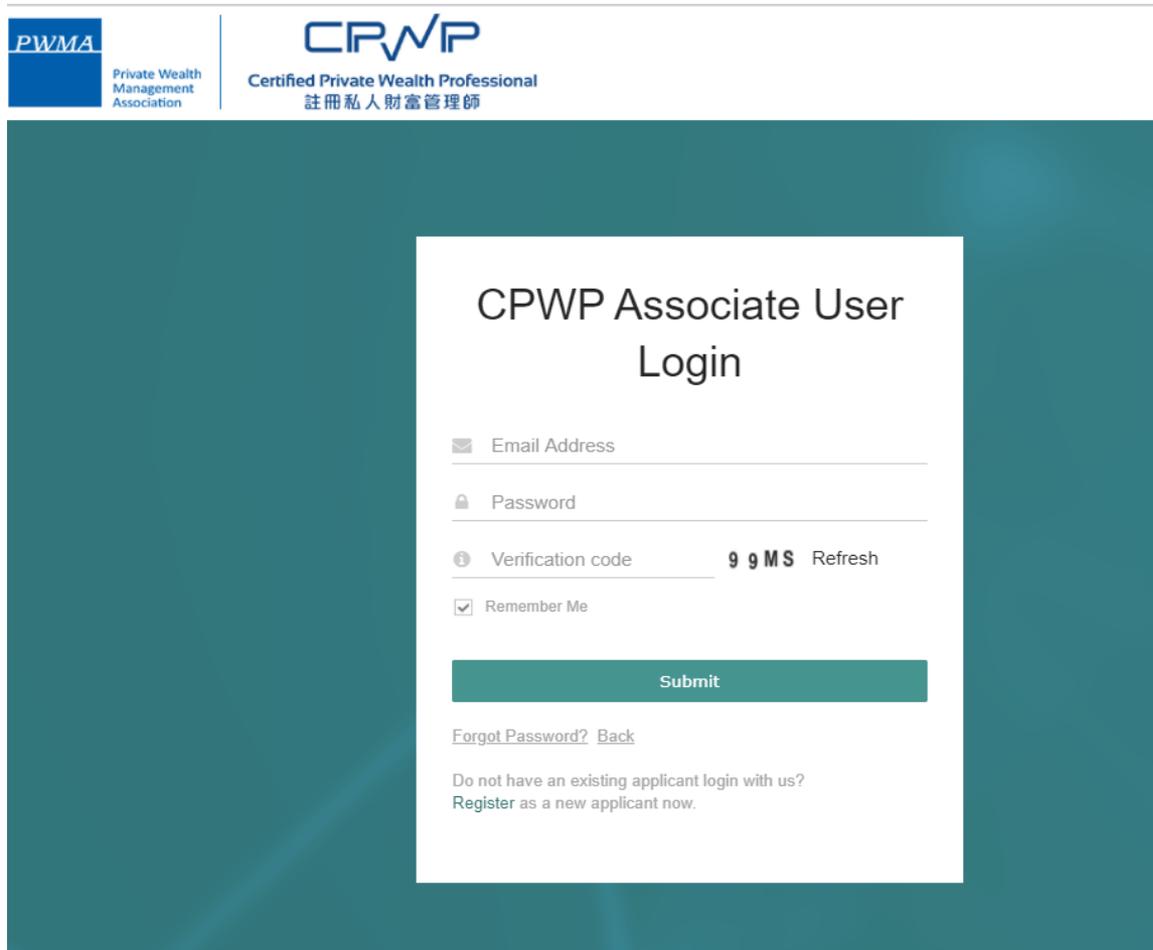
- Applicant log-in to [CPWP User Login] page by clicking <https://www.pwma-cpwponline.com> and select CPWP Associate Online Platform



12. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Login to CPWP Associate User Login page



PWMA Private Wealth Management Association

CPWP
Certified Private Wealth Professional
註冊私人財富管理師

CPWP Associate User Login

✉ Email Address

🔒 Password

📄 Verification code **99MS** Refresh

Remember Me

Submit

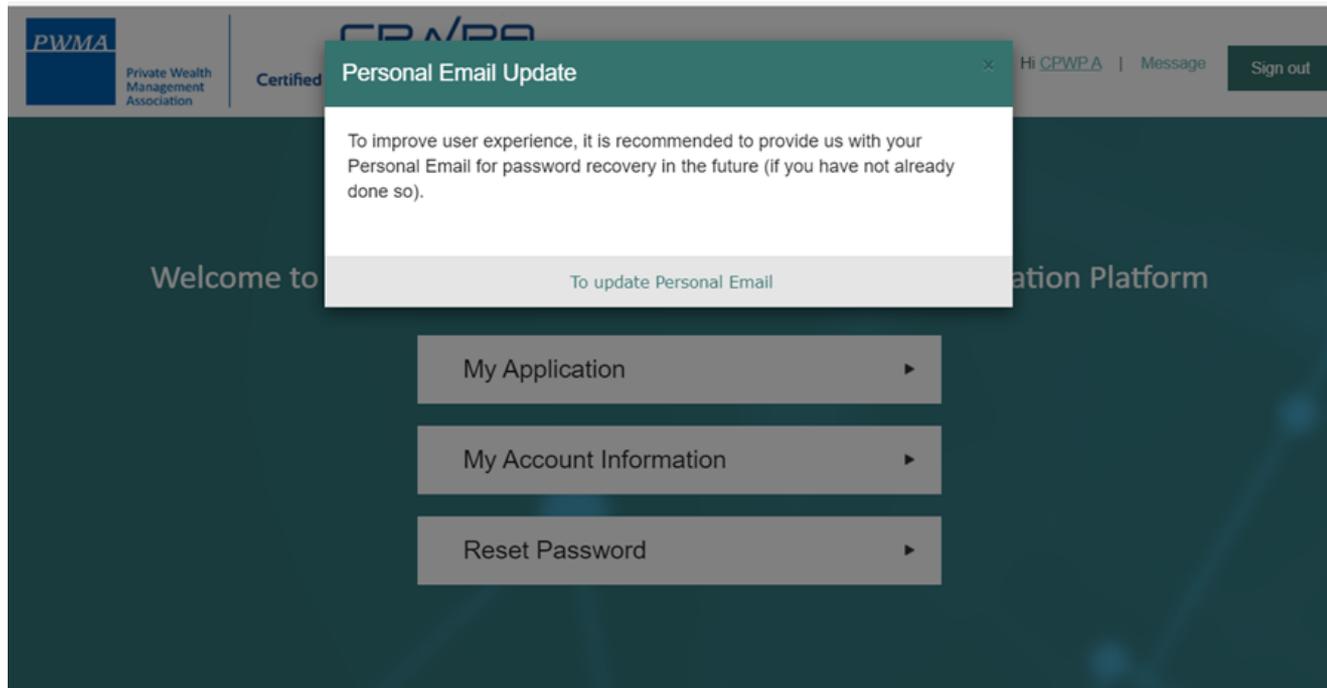
[Forgot Password?](#) [Back](#)

Do not have an existing applicant login with us?
Register as a new applicant now.

13. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- If Applicant has already input personal email address, applicant clicks [X] to close [To update Personal Email] prompt
- If Applicant has **NOT** input personal email address, applicant updates personal email address by clicking [To update Personal Email]



14. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Click [My Application] to [Apply for CPWP Associate]

The screenshot shows the user interface of the CPWP Associate Certification and Renewal Application Platform. At the top left is the PWMA logo (Private Wealth Management Association). In the center is the CPWPA logo (Certified Private Wealth Professional Associate / 註冊私人財富副管理師). At the top right, there is a user greeting "Hi CPWPA" with a "Message" link and a "Sign out" button. The main content area has a teal background with the text "Welcome to CPWP Associate Certification and Renewal Application Platform". Below this text is a vertical list of three white buttons: "My Application", "My Account Information", and "Reset Password". The "My Application" button is highlighted with a red rectangular border.

15. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Click [Apply for CPWP Associate] button

Private Wealth Management Association

Certified Private Wealth Professional Associate
註冊私人財富副管理師

Welcome [CPWPA](#) to CPWP Associate Online Platform.

Home | My Application | My Account | Reset Password | Message Sign out

My Application >

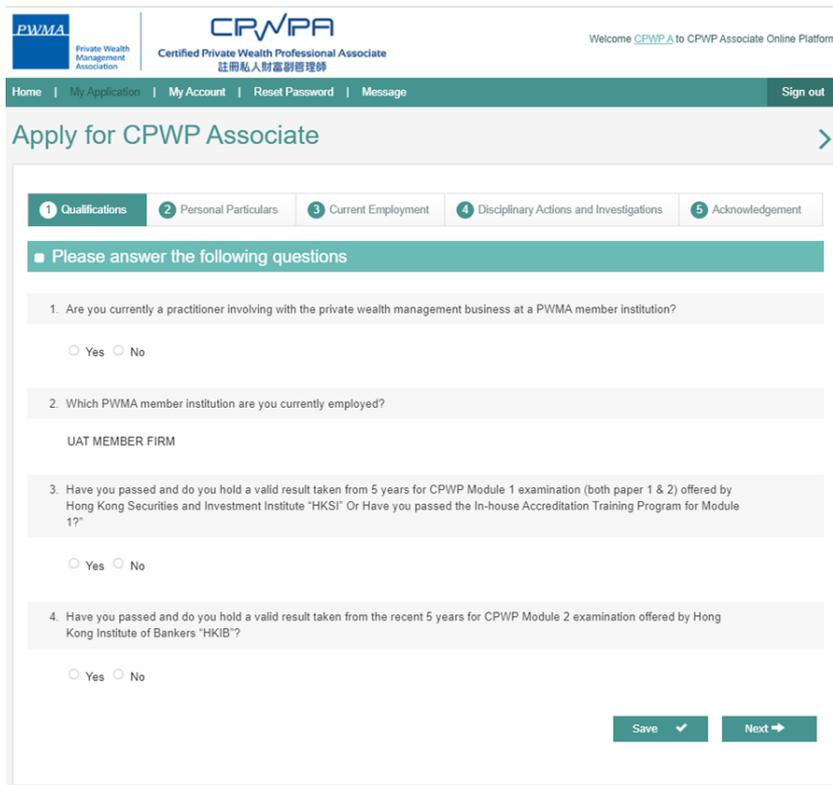
Application No	Applicant Name	Date of Submission to PWMA	Application Status	Action
No records				

Apply for CPWP Associate

16. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Fill-in all required information 1) Qualifications, 2) Personal Particulars, 3) Employment History, 4) Disciplinary Actions and Investigations, 5) Acknowledgement before clicking [submit] for Employer's verification
- Upload Module 1 and Module 2 official examination results to question 3 & 4



The screenshot shows the 'Apply for CPWP Associate' online platform. The header includes the PWMA logo, CPWPA logo (Certified Private Wealth Professional Associate), and a welcome message. The navigation bar contains links for Home, My Application, My Account, Reset Password, Message, and Sign out. The main content area displays a progress bar with five steps: 1. Qualifications, 2. Personal Particulars, 3. Current Employment, 4. Disciplinary Actions and Investigations, and 5. Acknowledgement. The current step is 'Qualifications', which contains four questions with radio button options for 'Yes' and 'No'. The questions are: 1. Are you currently a practitioner involving with the private wealth management business at a PWMA member institution? 2. Which PWMA member institution are you currently employed? (with 'UAT MEMBER FIRM' entered in the text field). 3. Have you passed and do you hold a valid result taken from 5 years for CPWP Module 1 examination (both paper 1 & 2) offered by Hong Kong Securities and Investment Institute 'HKSI' Or Have you passed the In-house Accreditation Training Program for Module 1? 4. Have you passed and do you hold a valid result taken from the recent 5 years for CPWP Module 2 examination offered by Hong Kong Institute of Bankers 'HKIB'? At the bottom right, there are 'Save' and 'Next' buttons.

17. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Applicant can click [save] button to complete the application later

Private Wealth Management Association
 Certified Private Wealth Professional Associate
 註冊私人財富管理師

Welcome CPWPA to CPWP Associate Online Platform.

[Home](#) | [My Application](#) | [My Account](#) | [Reset Password](#) | [Message](#) [Sign out](#)

Apply for CPWP Associate

1 Qualifications 2 Personal Particulars 3 Current Employment 4 Disciplinary Actions and Investigations 5 Acknowledgement

Please answer the following questions

1. Are you currently a practitioner involving with the private wealth management business at a PWMA member institution?

Yes No

2. Which PWMA member institution are you currently employed?

UAT MEMBER FIRM

3. Have you passed and do you hold a valid result taken from 5 years for CPWP Module 1 examination (both paper 1 & 2) offered by Hong Kong Securities and Investment Institute "HKSI" Or Have you passed the In-house Accreditation Training Program for Module 1?

Yes No

If you have answered "Yes" to this question, please upload official examination results or relevant document(s):

Upload Files

(File format: jpg/JPG/jpeg/png/doc/docx/pdf/xls/xlsx)

- [Module 1 - 2 Examination Results_1624433095.docx](#) (Uploaded date: 2021-06-23) ✕

4. Have you passed and do you hold a valid result taken from the recent 5 years for CPWP Module 2 examination offered by Hong Kong Institute of Bankers "HKIB"?

Yes No

If you have answered "Yes" to this question, please upload official examination results or relevant document(s):

Upload Files

(File format: jpg/JPG/jpeg/png/doc/docx/pdf/xls/xlsx)

- [Module 1 - 2 Examination Results_1624433105.docx](#) (Uploaded date: 2021-06-23) ✕

Save ✓ Next ➔

18. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Fill-in the start date under [Employment Period] and leave end date blank
- Confirm current role is a [Private Wealth Management Experience]



 Certified Private Wealth Professional Associate
 註冊私人財富副管理師

Welcome [CPWPA](#) to CPWP Associate Online Platform.

Home | My Application | My Account | Reset Password | Message Sign out

Apply for CPWP Associate

1 Qualifications 2 Personal Particulars **3 Current Employment** 4 Disciplinary Actions and Investigations 5 Acknowledgement

Current Employment Details:

Current Experience

Employer	Business Unit	Functional Title	Employment Period MM/DD/YY	Number of Years and Months in the Position/Title
UAT MEMBER FIRM	PWM	Client Service I	06/01/2020 -	1 year(s)

Is this a Private Wealth Management Experience?
 Yes No

Save ✓ ← Previous Next →

19. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Select the appropriate answers under Disciplinary Action and Investigation

The screenshot shows the 'Apply for CPWP Associate' online platform. The header includes the PWMA logo, the CPWPA logo (Certified Private Wealth Professional Associate), and a welcome message. The navigation bar contains links for Home, My Application, My Account, Reset Password, Message, and Sign out. The main content area is titled 'Apply for CPWP Associate' and features a progress bar with five steps: 1. Qualifications, 2. Personal Particulars, 3. Current Employment, 4. Disciplinary Actions and Investigations (currently selected), and 5. Acknowledgement. Below the progress bar, the section is titled 'Disciplinary Actions and Investigations, Financial Status and Character'. A note states 'Required to answer by selecting Yes or No:'. The form contains five questions, each with radio button options for 'Yes' and 'No':

1. Have you ever been reprimanded, censured, disciplined by any professional or regulatory authority?
 Yes No
2. Have you ever had a record of non-compliance with various non-statutory codes, or been censured, disciplined or disqualified by any professional or regulatory body in relation to your profession?
 Yes No
3. Have you ever been investigated about offences involving fraud or dishonesty or adjudged by court to be criminally or civilly liable for fraud, dishonesty or misfeasance?
 Yes No
4. Have you ever been refused or restricted from the right to carry on any profession for which a specific license, registration or other authorization is required by law?
 Yes No
5. Have you ever been adjudged bankrupt, or served with a bankruptcy petition?
 Yes No

At the bottom of the form, there are three buttons: 'Save' (with a dropdown arrow), 'Previous' (with a left arrow), and 'Next' (with a right arrow).

20. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Check the Acknowledgement and Declaration box before clicking [submit]

The screenshot shows the PWMA CPWP Associate Online Platform interface. The header includes the PWMA logo, the CPWPA logo (Certified Private Wealth Professional Associate), and a welcome message. The navigation bar contains links for Home, My Application, My Account, Reset Password, Message, and Sign out. The main heading is "Apply for CPWP Associate". Below this is a progress bar with five steps: 1. Qualifications, 2. Personal Particulars, 3. Current Employment, 4. Disciplinary Actions and Investigations, and 5. Acknowledgement. The current step is "Acknowledgement and Declaration (Applicant)". The form contains a list of seven statements for the applicant to read and agree to. The final statement, "Check this box to indicate that you have read, understood, and agreed to the above acknowledgement and declaration.", is highlighted with a red rectangle. At the bottom of the form are three buttons: "Save", "Previous", and "Submit".

PWMA Private Wealth Management Association

CPWPA Certified Private Wealth Professional Associate
註冊私人財富管理師

Welcome **CPWPA** to CPWP Associate Online Platform.

Home | My Application | My Account | Reset Password | Message | Sign out

Apply for CPWP Associate

1 Qualifications 2 Personal Particulars 3 Current Employment 4 Disciplinary Actions and Investigations 5 Acknowledgement

Acknowledgement and Declaration (Applicant)

- I declare that all information I have provided in this form is true and correct.
- I understand that under any circumstances, the submitted application and paid application fee for each application are non-refundable and non-transferable.
- I authorize the PWMA to obtain, and the relevant authorities to release, any information about my qualifications and/or employment as required for my application.
- I acknowledge that PWMA has the right to withdraw my CPWP Associate designation if I do not meet the requirements.
- I confirm that I have read and understood the Personal Information Collection Statement set out in the website of PWMA at www.pwma.org.hk and consent to the terms set out therein.
- I attach herewith copies of results of Module 1 and/or Module 2 in respect of Enhanced Competency Framework.
- I understand that all information I have provided in this application will be accessible by any authorized person by my employer.

Check this box to indicate that you have read, understood, and agreed to the above acknowledgement and declaration.

Save ✓ Previous Submit →

21. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Receive 'Your application has been submitted successfully' prompt

The screenshot displays the CPWP Associate Online Platform interface. At the top left is the PWMA logo (Private Wealth Management Association). In the center is the CPWPA logo (Certified Private Wealth Professional Associate / 註冊私人財富管理師). On the top right, a welcome message reads: "Welcome [CPWPA](#) to CPWP Associate Online Platform." Below the logos is a navigation bar with links: Home | My Application | My Account | Reset Password | Message, and a Sign out button. The main heading is "Apply for CPWP Associate" with a right-pointing arrow. A prominent green banner contains the message: "Your application has been submitted successfully". Below this, a light gray box contains the following text: "Thank you for using our on-line CPWP associate certification application platform. Please note that your application form has been sent to your employer for verification. Once the employment information provided by you in this application is verified by your employer and a non-refundable and non-transferable application fee is received by PWMA, your application will be submitted to PWMA for processing." At the bottom center of the gray box is a green button labeled "Back to Mainpage" with a right-pointing arrow.

22. New Applicant tracks Application Status

Apply for CPWP Associate procedures

- View [Application Status] under [My Application]



The screenshot displays the user interface for the CPWP Associate Online Platform. At the top, there are logos for PWMA (Private Wealth Management Association) and CPWPA (Certified Private Wealth Professional Associate / 註冊私人財富副管理師). A welcome message reads: "Welcome CPWPA to CPWP Associate Online Platform." Below the logos is a navigation bar with links: Home, My Application, My Account, Reset Password, Message, and Sign out. The main content area is titled "My Application" and contains a table with the following data:

Application No	Applicant Name	Date of Submission to PWMA	Application Status	Action
A2021000058N	CPWP A		Verification in Progress by Employer	View

23. New Applicant - if application fee is paid by Member Firm

Apply for CPWP Associate procedures

- Upon Member Firm's verification, applicant received a message if the Member Firm settled the payment for applicant

Dear Applicant

Your CPWP Associate Application (Associate Application No: A20210000XXN) has been submitted to PWMA for processing.

The application fee has been paid by your bank.

Yours sincerely,

Private Wealth Management Association Limited

24. New Applicant - if application fee is paid by Applicant

Settles Payment by Credit Card or Bank Transfer or Cheque

- Upon Member Firm's verification, applicant receives an email notification to settle payment

Dear Applicant

Application (A20210000XXN) has been verified by the relevant department of your bank, please proceed to make payment for your CPWP associate application.

Application No : A20210000XXN

Please click the below link to pay now:

<https://www.pwma-cpwponline.com/associate/>

The invoice could be download here:

<https://www.pwma-cpwponline.com/test/>

Yours sincerely,

Private Wealth Management Association Limited

25. New Applicant settles Payment

If Payment is settled by Applicant's Credit Card

- Click [Go to Pay] in [Action] under [My Application] to settle payment





Welcome [CPWPA](#) to CPWP Associate Online Platform.

[Home](#) | [My Application](#) | [My Account](#) | [Reset Password](#) | [Message](#) 1 | [Sign out](#)

My Application >

Application No	Applicant Name	Date of Submission to PWMA	Application Status	Action
A2021000058N	CPWP A		Pending Payment by Applicant	View Go to Pay

Comment(s)

2021-06-23 21:51:58 Associate Application(A2021000058N) has been verified by UAT MEMBER FIRM . Please proceed to make payment in the "My Application".

26. New Applicant settles Payment

If Payment is settled by Applicant's Credit Card

- Select Online Payment if pay by Credit Card

Home | My Application | My Account | Reset Password | Message **1** | Sign out

Payment

Application No	Name	Employer	Expire Date	Action	Price
A2021000058N	CPWPA	UAT MEMBER FIRM		Apply	1000.00

Payment Method:

Online Payment (Support Visa & Master)

Cheque Payment/Bank Transfer

[← Back](#) [Submit →](#)

27. New Applicant settles Payment

If Payment is settled by Applicant's Credit Card

- Fill out Credit Card information before submitting the application to PWMA

PWMA Private Wealth Management Association | **CPWPA** Certified Private Wealth Professional Associate 註冊私人財富管理師

Welcome CPWP ASSOCIATE to CPWP associate certification application platform.

Online Payment

Please make sure your information are correct.

Application ID : A2021000036N
 Name : CPWPA
 Employer : UAT MEMBER
 Charge : HK\$ 1000.00

[← Back](#) [Confirm Payment →](#)

* Please prepare your Visa / Master/JCB credit card for data input in next page. Please note that once you click "Confirm Payment" to enter payment gateway, the transaction cannot be cancelled.
 * By clicking "Confirm Payment" now, I agree to abide by the PWMA Terms and Conditions and Privacy Policy.
 * Please do not close the window and wait to return to cpwp online platform.
 * To successfully complete the payment transaction, please wait until all operations have been completed through "Global Payment" before returning to the system.

Billing Information

* Required field

First Name *
 Last Name *
 Address Line 1 *
 City *
 Country/Region *
 Email *

Your Order

Total amount
HKD 1,000.00

Payment Details

Card Type *

Visa Mastercard
 JCB

Card Number *

Expiration Month * / Expiration Year *

CVV *

This code is a three or four digit number printed on the back or front of credit cards.

[Cancel](#) [Next](#)

28. New Applicant settles Payment

If Payment is settled by Cheque or Bank Transfer

- Select Cheque Payment/Bank Transfer and click [Upload Files] to upload Cheque copy or Bank receipt before [Submit]

Payment

Application No	Name	Employer	Expire Date	Action	Price
A2021000058N	CPWP A	UAT MEMBER FIRM		Apply	1000.00

Payment Method:

Online Payment (Support Visa & Master)

Cheque Payment/Bank Transfer

Attach Cheque Payment/Bank Transfer Receipt or Payment Proof

Upload Files

(File format: jpg/JPG/jpeg/png/doc/docx/pdf/xls/xlsx)

• [Dummy_Bank_Slip_1624456563.docx](#) (Uploaded date: 2021-06-23) ✕

[← Back](#) [Submit →](#)

29. New Applicant settles Payment

If Payment is settled by Cheque Payment or Bank Transfer

- Click [ok] to submit CPWPA application

The screenshot shows the CPWPA application payment interface. A modal dialog box titled "Payment and submission processing" is displayed in the foreground, asking "Are you sure to continue?" with "Cancel" and "OK" buttons. The background page shows the "Payment" section with a table of applications and payment options.

Application No	Name	Employer	Expire Date	Action	Price
A2021000058N	CPWP A	UAT MEMBER FIRM		Apply	1000.00

Payment Method:

- Online Payment (Support Visa & Master)
- Cheque Payment/Bank Transfer

Attach Cheque Payment/Bank Transfer Receipt or Payment Proof

Upload Files 

(File format: jpg/JPG/jpeg/png/doc/docx/pdf/xls/xlsx)

- [Dummy Bank Slip_1624456563.docx](#) (Uploaded date: 2021-06-23) ✕

Navigation buttons: [← Back](#) and [Submit →](#)

30. New Applicant settles Payment

Applicant receives a “Your application has been submitted successfully’ prompt

The screenshot displays the CPWPA (Certified Private Wealth Professional Associate) online platform interface. At the top left is the PWMA logo. The main header features the CPWPA logo and the text "Certified Private Wealth Professional Associate" and "註冊私人財富副管理師". A welcome message reads "Welcome CPWPA to CPWP Associate Online Platform." The navigation bar includes links for Home, My Application, My Account, Reset Password, Message (with a red notification bubble containing the number 2), and Sign out. The main content area is titled "Payment" and contains a green notification banner stating "Your application has been submitted successfully". Below this, a large green checkmark is displayed next to the text: "Thank you for your payment! This CPWP Associate application has been submitted to PWMA for processing." At the bottom of the notification area is a button labeled "Back to Mainpage" with a right-pointing arrow.

31. Applicant receives CPWPA Certification result and download online CPWPA e-certificate

After approval granted by Accreditation and Exemption Committee

- Receive email “Granting of Certified Private Wealth Professional (“CPWP”) Associate Certification (CPWP Associate Certification No. : A2021000010)

Dear CPWP A,

Granting of Certified Private Wealth Professional Associate (“CPWPA”) Certification

With respect to your application for CPWP Associate certification for the purpose of the Enhanced Competency Framework, we take pleasure to confirm that you have fulfilled the prerequisite requirements for certification. A CPWPA certification <https://www.pwma-cpwponline.com/test/associate/certification> is hereby granted to you with expiry date till 31 December 2022.

Please note that the said certification has to be renewed annually by taking not less than 10 hours of private wealth management (“PWM”)–related On-going Professional Training (“OPT”) in each calendar year, of which 5 hours may be the Continuous Professional Training required by the Securities and Futures Commission. Of the 10 OPT hours, at least 2 hours should be on PWM-related ethics and compliance.

For CPWPA certification renewal, you should submit to us the Online Application Form for CPWPA Certification Renewal (On-going Professional Training) within 1 month following the expiry of your certification.

We would like to remind you that you are to abide by the attached Private Wealth Management Association (“PWMA”) Code of Ethics and Conduct and certain conditions listed under Section 15 of the PWMA By-laws, failing which your certification status may be revoked.

Please note quote the CPWPA number for any future correspondence with us.

Yours sincerely,

Private Wealth Management Association Limited

32. Applicant receives CPWPA Certification result and download online CPWPA e-certificate

After approval granted by Accreditation and Exemption Committee

- View Certificate's expiry date in [My Certification]
- Go to [My Application] to view Application Status



The screenshot shows the user interface of the CPWPA Associate Certification and Renewal Application Platform. At the top left is the PWMA logo (Private Wealth Management Association). In the center is the CPWPA logo (Certified Private Wealth Professional Associate, 註冊私人財富副管理師). On the right, there is a user greeting "Hi CPWPA" with a "Message" link and a "Sign out" button. The main content area has a teal background with the text "Welcome to CPWP Associate Certification and Renewal Application Platform". Below this, there are four white buttons with right-pointing arrows: "My Application", "My Certification (Expire Date: 2022-12-31)", "My Account Information", and "Reset Password".

33. Applicant receives CPWPA Certification result and download online CPWPA e-certificate

After approval granted by Accreditation and Exemption Committee

- View [Approved] status under [My Application]



The screenshot shows the user interface of the CPWPA Associate Online Platform. At the top left is the PWMA logo (Private Wealth Management Association). In the center is the CPWPA logo (Certified Private Wealth Professional Associate / 註冊私人財富副管理師). On the right, a welcome message reads: "Welcome CPWPA to CPWP Associate Online Platform." Below the logos is a navigation bar with links: Home | My Application | My Certification | My Account | Reset Password | Message (with a red notification bubble containing the number 3) | Apply for upgrading to. A "Sign out" button is located on the right side of the navigation bar. Below the navigation bar, the page title "My Application" is displayed with a right-pointing arrow. The main content area features a table with the following data:

Application No	Applicant Name	Date of Submission to PWMA	Application Status	Action
A2021000058N	CPWP A	2021-06-23	Approved	View

34. Applicant receives CPWPA Certification result and download online CPWPA e-certificate

After approval granted by Accreditation and Exemption Committee

- Go to [My Certification] and click [view] to print electronic certificate



 Private Wealth Management Association
 

 Certified Private Wealth Professional Associate

 註冊私人財富副管理師

Welcome [CPWPA](#) to CPWP Associate Online Platform.

[Home](#) | [My Application](#) | [My Certification](#) | [My Account](#) | [Reset Password](#) | [Message](#) 3 | [Apply for upgrading to](#)

[Sign out](#)

CPWP Certification

My Certification >

CPWPA No.	Name	Member Firm	Certification Status	Effective Till	Action
A2021000010	CPWP A	UAT MEMBER FIRM	Certified	2022-12-31	<ul style="list-style-type: none"> ▶ View ▶ Update Account Information

35. Applicant receives CPWPA Certification result and download online CPWPA e-certificate

- Online CPWP Associate electronic certificate is available

