

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)



Welcome to CPWP and CPWP Associate Online Platform

CPWP Online Platform ▶

CPWP Associate Online Platform ▶

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 overlaid on the main application page. The modal contains the following text:

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 application page shows the PWMA logo, the text "Certified", and a "Member Firm list" dropdown menu. At the bottom of the page, there are "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](#) as a new applicant now.

4. New Application Process

Registration (Cont'd)

- Applicant chooses your Current Employer from the Member Firm list

The screenshot shows the PWMA (Private Wealth Management Association) and CRWPA (Certified Private Wealth Professional Associate) logos at the top. The main content area is a teal background with a white box titled "Register as New Applicant". Inside this box, the text "Your Current Employer is:" is followed by a dropdown menu labeled "Member Firm list" with a downward arrow. Below the dropdown are two teal 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 shows a web form titled "Register as New Applicant". At the top, there are logos for PWMA (Private Wealth Management Association) and CPWPA (Certified Private Wealth Professional Associate / 注册私人财富专业资格). Below the title, there is a field labeled "Your Current Employer is:" with a pulldown menu. The menu is open, displaying a list of member firms. The list includes various international and local banks and financial institutions, such as Bank J. Safra Sarasin Ltd., Bank Julius Baer & Co. AG, Bank of China (Hong Kong) Limited, and others. The list is scrollable, and the first few items are highlighted.

Register as New Applicant

Your Current Employer is:


Member Firm list

- 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
- CMB 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
- EFB 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 the 'Register as New Applicant' web form. At the top, the PWMA logo and the CRWPA logo (Certified Private Wealth Professional Associate) are visible. The form has a teal header bar with the title 'Register as New Applicant' and a right-pointing arrow. Below the header, there are three tabs: '1 Personal Particulars', '2 Identity Information' (which is selected and highlighted in teal), and '3 Employment Information'. Under the 'Identity Information' tab, there are two input fields. The first is labeled 'First 4 digits of HKID Card Number *:' and the second is labeled 'First 4 digits of Passport Number: (If no HKID Card)'. At the bottom right of the form, 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”



Private Wealth
Management
Association



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

Register as New Applicant >

1 Personal Particulars

2 Identity Information

3 Employment Information

■ Employment Information

Company Name: UAT MEMBER FIRM

Business Unit *:

Functional Title:

☐ 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.

☐ By creating an account with PWMA, you agree to abide by the PWMA [Privacy Policy](#) and website [Terms and Conditions](#).

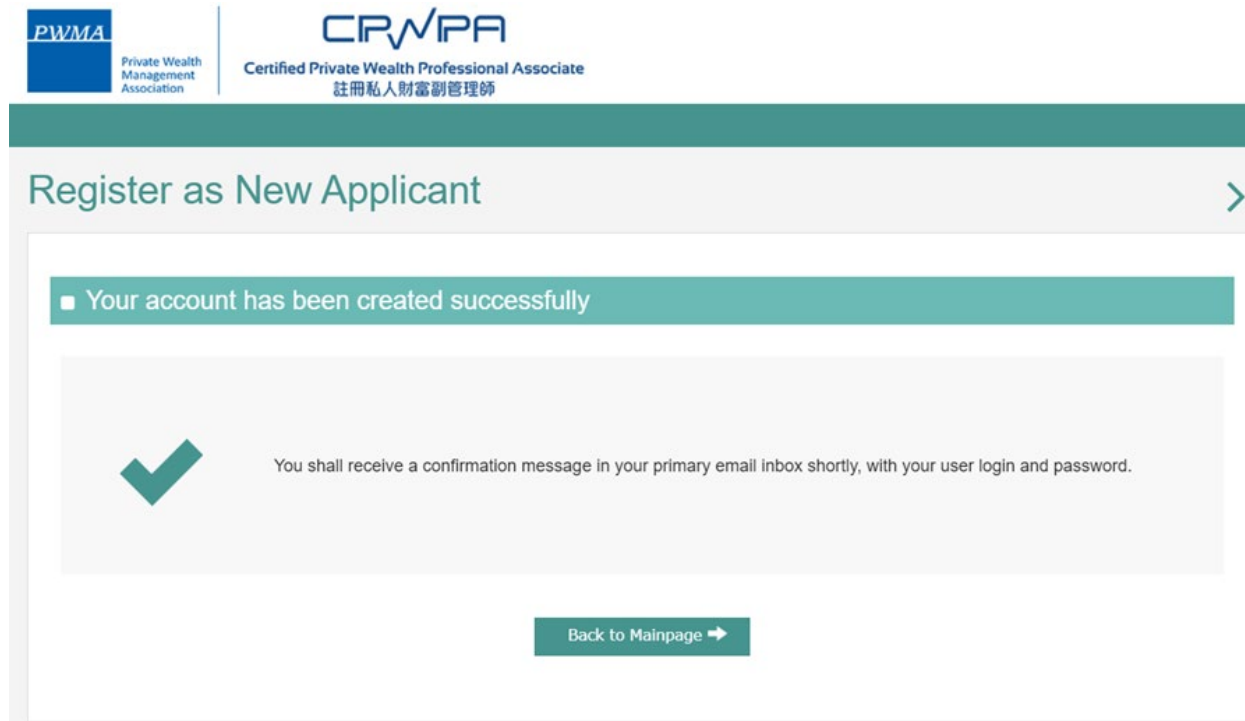
← Previous

Submit →

9. New Application Process

Registration (Cont'd)

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



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 9 9 MS Refresh

☒ Remember Me

Submit

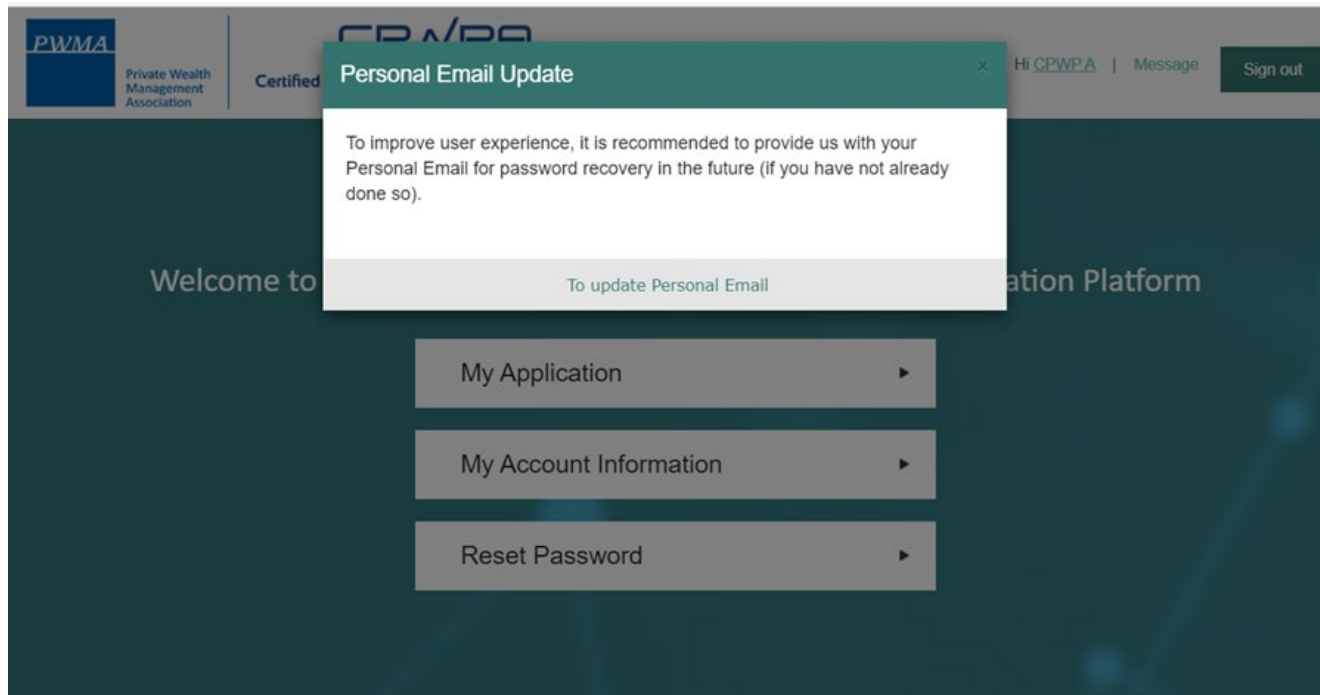
[Forgot Password?](#) [Back](#)

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]



15. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Click [Apply for CPWP Associate] button

The screenshot displays the CPWPA Online Platform interface. 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, and Message. A "Sign out" button is located on the right side of the navigation bar.

The main section is titled "My Application" with a right-pointing arrow. Below this title is a table with the following columns: Application No, Applicant Name, Date of Submission to PWMA, Application Status, and Action. The table is currently empty, with the text "No records" displayed in red. Below the table, there is a button labeled "Apply for CPWP Associate" which is highlighted with a red rectangular border.

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, and the text 'Certified Private Wealth Professional Associate' and '註冊私人財富管理師'. A navigation bar contains links for Home, My Application, My Account, Reset Password, Message, and Sign out. The main title is 'Apply for CPWP Associate'. Below the title is a progress bar with five steps: 1 Qualifications, 2 Personal Particulars, 3 Current Employment, 4 Disciplinary Actions and Investigations, and 5 Acknowledgement. The first step, 'Qualifications', is selected. Below the progress bar is a section titled 'Please answer the following questions'. It contains four questions with radio button options for 'Yes' and 'No'. Question 1 asks if the user is currently a practitioner involving with the private wealth management business at a PWMA member institution. Question 2 asks which PWMA member institution the user is currently employed at, with 'UAT MEMBER FIRM' entered. Question 3 asks if the user has passed and holds 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 has passed the In-house Accreditation Training Program for Module 1. Question 4 asks if the user has passed and holds 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 are 'Save' and 'Next' buttons.

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

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

Save ✓ Next ➔

17. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

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

PWMA Private Wealth Management Association **CPWPA** Certified Private Wealth Professional Associate 注册私人财富财富管理师

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: 1624433085.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]

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](#)

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 | <input type="text" value="PWM"/> | Client Service I ▼ | 06/01/2020 - <input type="text"/> | 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 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 (currently selected), and 5. Acknowledgement. The selected step is titled 'Disciplinary Actions and Investigations, Financial Status and Character'. Below the title, it states 'Required to answer by selecting Yes or No:'. There are five questions, each with 'Yes' and 'No' radio button options:

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 right, there are three buttons: 'Save' (with a checkmark icon), 'Previous' (with a left arrow icon), and 'Next' (with a right arrow icon).

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 'Apply for CPWP Associate' online platform. The header includes the PWMA logo, the CPWPA logo, and the text 'Welcome CPWPA to CPWP Associate Online Platform.' The navigation bar contains links: 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 '5 Acknowledgement' step is currently selected. The section is titled 'Acknowledgement and Declaration (Applicant)'. It contains a list of seven statements for the applicant to agree to, each preceded by a bullet point. The final statement is 'Check this box to indicate that you have read, understood, and agreed to the above acknowledgement and declaration.' This statement is highlighted with a red rectangular box. At the bottom of the form are three buttons: 'Save' with a checkmark icon, 'Previous' with a left arrow icon, and 'Submit' with a right arrow icon.

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, the PWMA logo and the CPWPA logo are visible, along with the text 'Certified Private Wealth Professional Associate' and '註冊私人財富管理師'. A navigation bar includes links for Home, My Application, My Account, Reset Password, and Message, with a Sign out button on the right. The main heading is 'Apply for CPWP Associate'. A teal banner at the top of the content area states 'Your application has been submitted successfully'. Below this, a message reads: '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.' A 'Back to Mainpage' button with a right arrow is located at the bottom.

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 >

■ Your application has been submitted successfully

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.

Back to Mainpage ➡

22. New Applicant tracks Application Status

Apply for CPWP Associate procedures

- View [Application Status] under [My Application]

The screenshot displays the CPWP Associate Online Platform interface. At the top, there are logos for PWMA (Private Wealth Management Association) and CPWPA (Certified Private Wealth Professional Associate). 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, and Message. A "Sign out" button is located on the right side of the navigation bar. The main content area is titled "My Application" with a right-pointing arrow. Below this title is 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/>

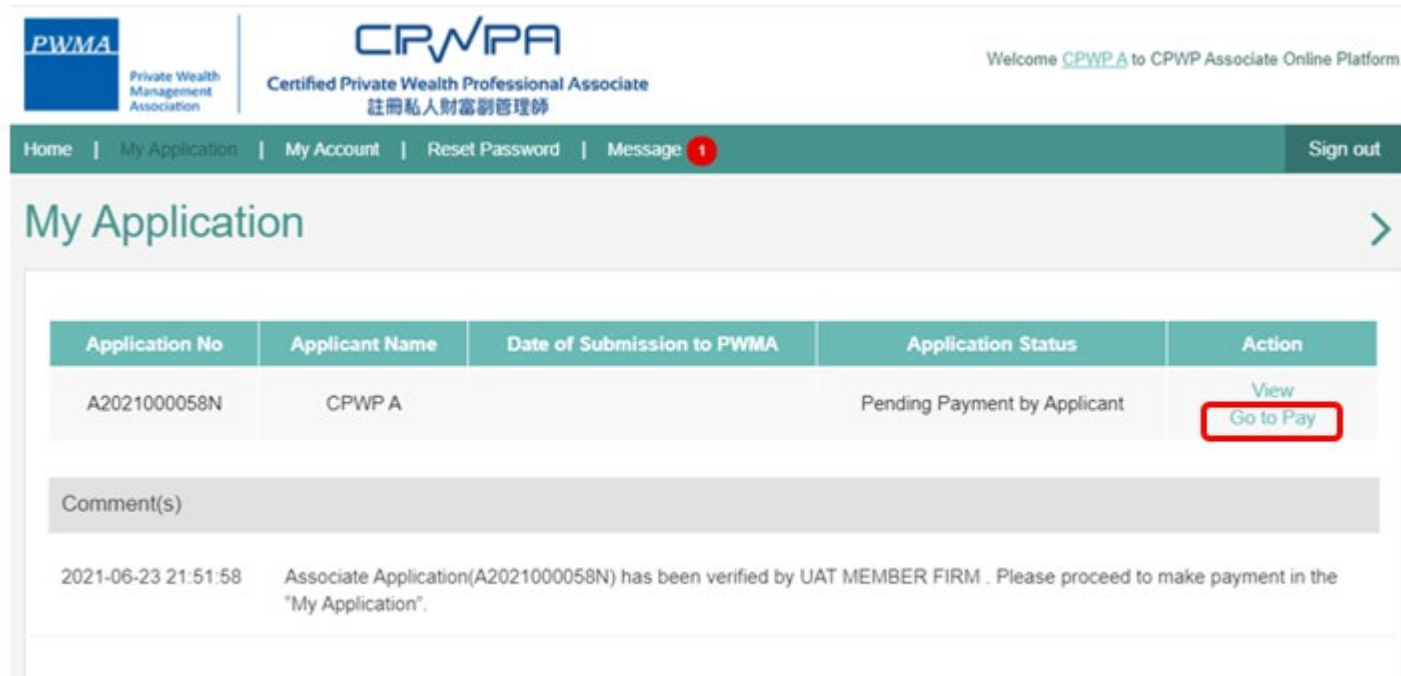
Yours sincerely,

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



The screenshot shows the CPWPA Associate Online Platform interface. At the top, there is a header with the PWMA logo, the CPWPA logo, and a welcome message. Below the header is a navigation bar with links: Home, My Application, My Account, Reset Password, Message (with a red notification icon), 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 | | Pending Payment by Applicant | View Go to Pay |

Below the table, there is a section for 'Comment(s)' with a timestamp and a message: '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



Private Wealth
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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](#) 1

[Sign out](#)

Payment >

| Application No | Name | Employer | Expire Date | Action | Price |
|----------------|--------|-----------------|-------------|--------|--------|
| A2021000058N | CPWP A | UAT MEMBER FIRM | | Apply | 500.00 |

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



Private Wealth
Management
Association



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 : | CPWP A |
| Employer : | UAT MEMBER |
| Charge : | HK\$ 500.00 |

Back

Confirm Payment

* Please prepare your Visa / MasterCard 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

First Name *

Last Name *

Address Line 1 *

City *

Country/Region *

Email *

Payment Details

Card Type *

Card Number *

Expiration Month *

Expiration Year *

CVN *

Cancel

Next

Your Order

Total amount

HKD 500.00

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]

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](#) 1 | [Sign out](#)

Payment

| Application No | Name | Employer | Expire Date | Action | Price |
|----------------|--------|-----------------|-------------|--------|--------|
| A2021000058N | CPWP A | UAT MEMBER FIRM | | Apply | 500.00 |

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_1624456561.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 page. A modal dialog box titled "Payment and submission processing" is displayed in the center, asking "Are you sure to continue?" with "Cancel" and "OK" buttons. The background page has a header with the PWMA logo and navigation links. Below the header, there's a "Payment" section with a table of applications. The table has columns: Application No, Name, Employer, Expire Date, Action, and Price. One application is listed: A2021000058N, CPWP A, UAT MEMBER FIRM, with an "Apply" action and a price of 500.00. Below the table, the "Payment Method" section shows two options: "Online Payment (Support Visa & Master)" and "Cheque Payment/Bank Transfer", with the latter selected. A red box prompts the user to "Attach Cheque Payment/Bank Transfer Receipt or Payment Proof". There is an "Upload Files" button and a list of uploaded files, including "Dummy Bank Slip_1624456563.docx" with an upload date of 2021-06-23. At the bottom, there are "Back" and "Submit" buttons.

| Application No | Name | Employer | Expire Date | Action | Price |
|----------------|--------|-----------------|-------------|--------|--------|
| A2021000058N | CPWP A | UAT MEMBER FIRM | | Apply | 500.00 |

Payment Method:

☐ Online Payment (Support Visa & Master)

☒ Cheque Payment/Bank Transfer

Attach Cheque Payment/Bank Transfer Receipt or Payment Proof

Upload Files

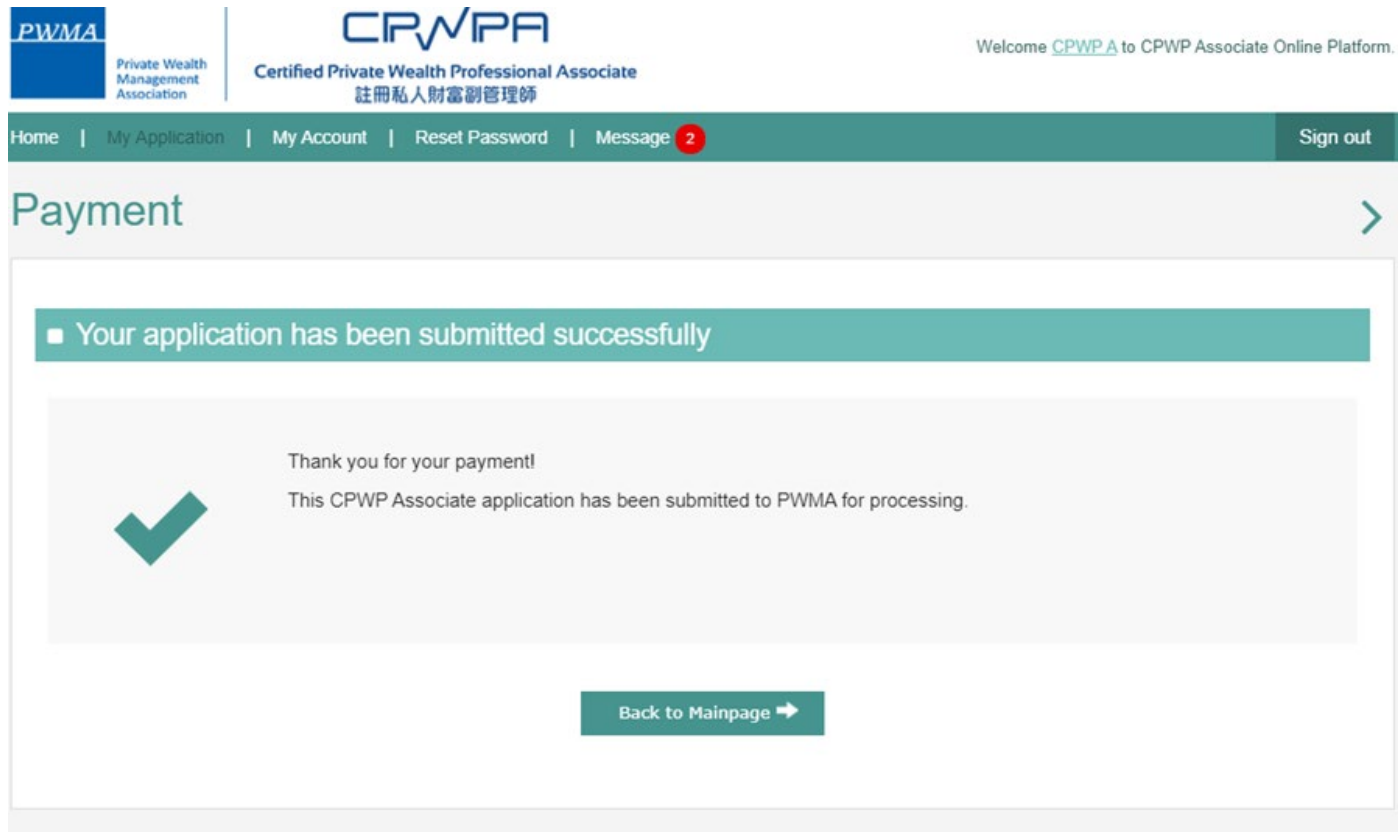
(File format: jpg/JPG/jpeg/png/doc/docx/pdf/xls/xlsx)

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

[← Back](#) [Submit →](#)

30. New Applicant settles Payment

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



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



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]



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 Application >

| 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 | ▶ View ▶ Update Account Information |

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

- Online CPWP Associate electronic certificate is available

