

CPWPA Online Platform

CPWP Associate Certification Application User Guide for Applicant (Member firm/ Non-member firm)

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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

Registration (Cont'd)

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

PWMA Private Wealth Management Association

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

CPWP Associate User Login

Email Address

Password

Verification code

Remember Me

Submit

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

Do you have an existing applicant login with us?
Register or a new applicant now.

3. New Application Process

Requirements for CPWPA certification

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

The screenshot shows a web application interface for PWMA. A modal dialog box is open, titled "Requirements for CPWP Associate certification:". The dialog contains the following text:

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

- 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.

I have read and understood the above requirements.

Please click [Confirm] to continue.

At the bottom of the dialog, there are two buttons: "Confirm" and "No".

In the background, the application form is partially visible, showing the PWMA logo, the text "Certified CPWPA", and a dropdown menu with the selected option "University Students (Full-Time)".

4. New Application Process

Registration (Cont'd)

- For PWMA Member firm applicants, please choose the first option and select a member firm from the pulldown list

The screenshot shows a registration form titled "Register as New Applicant". Below the title, it asks the user to "Please select your employment status, you are currently:". There are three radio button options:

- Employed by PWMA Member Firm (This option is selected, and a dropdown menu is open below it, listing various member firms such as Agricultural Bank of China, Bank J. Safra Sarasin Ltd., Bank of China, etc.)
- [Unselected]
- [Unselected]

 The dropdown menu lists the following member firms:

- Agricultural Bank of China, Hong Kong Branch
- 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
- Banque Pictet & Cie (Europe) S.A., Hong Kong Branch
- BNP Paribas Hong Kong branch
- CA Indosuez (Switzerland) SA, Hong Kong Branch
- China CITIC Bank International Limited
- China Construction Bank (Asia) Corporation Limited
- China Everbright Bank Co., Ltd, Hong Kong Branch
- China Minsheng Banking Corp., Ltd. Hong Kong Branch
- Chong Hing Bank Limited
- Citibank, N.A.,
- Citigold Private Client, Citibank (Hong Kong) Limited

5. New Application Process

Registration (Cont'd)

- For Non-PWMA member firm applicants, please choose the second option and input employer's name or other employment status



Register as New Applicant

Please select your employment status, you are currently:

Employed by PWMA Member Firm

Employed by Non-PWMA Member Firm/ Others
Please input ...

University Students (Full-Time)

[← Back](#) [Next →](#)

6. New Application Process

Registration (Cont'd)

- Fill out the required personal information under [Personal Particulars]

The screenshot displays the 'Register as New Applicant' form. 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). The form is divided into three steps: 1. Personal Particulars (highlighted in green), 2. Identity Information, and 3. Employment Information. The 'Personal Particulars' section includes the following fields:

- Title *: Radio buttons for Dr, Mr, Mrs, Ms.
- Family Name *: Text input field with a remark: (Remark: The name should match your HKID/passport record.)
- Given Name *: Text input field with a remark: (Remark: The name should match your HKID/passport record.)
- Date of Birth *: Text input field.
- Login Email *: Text input field.
- Personal Email: Text input field.
- Contact No. *: Three text input fields for Office *, Mobile *, and Home(Optional).
- Correspondence Address *: Text input field.

A 'Next' button with a right-pointing arrow is located at the bottom right of the form.

7. New Application Process

Registration (Cont'd)

- Complete [Identity Information]

The screenshot displays the 'Register as New Applicant' form. At the top, 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 form title is 'Register as New Applicant' with a right-pointing arrow. Below the title is a progress bar with three steps: '1 Personal Particulars', '2 Identity Information' (which is 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)

- For Member firm applicants, please input Business Unit, select Functional Title from the pulldown menu under [Employment Information] and check all boxes to confirm the declaration statements before clicking "Submit"

The screenshot shows the 'Register as New Applicant' form. 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). The form has three steps: 1. Personal Particulars, 2. Identity Information, and 3. Employment Information. The 'Employment Information' section is active and contains the following fields:

- Company Name: UAT Member Firm_2
- Business Unit *: [Empty text box]
- Functional Title: [Please Select dropdown menu]

Below the fields are three checkboxes for declaration statements:

- 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](#).

At the bottom right, there are two buttons: '← Previous' and 'Submit →'.

9. New Application Process

Registration (Cont'd)

- For Non-PWMA Member Firm applicants, please input Business Unit and Functional Title under **[Employment Information]**, and check all boxes to confirm the declaration statements before clicking “Submit”



Private Wealth
Management
Association



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

Register as New Applicant
>

1 Personal Particulars

2 Identity Information

3 Employment Information

■ Employment Information

Company Name: ABC Asset Management Limited

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 (if applicable).

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

← Previous

Submit →

10. New Application Process

Registration (Cont'd)

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

The screenshot shows a web interface for registration. At the top left, 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). The main heading is "Register as New Applicant" with a right-pointing arrow. Below this, a green notification bar states "Your account has been created successfully". Underneath, 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 center, there is a button labeled "Back to Mainpage" with a right-pointing arrow.

11. 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 : XXXXXXXX@XXXXXX.COM

Password : 6CWa*9N1

Yours sincerely,

Private Wealth Management Association Limited

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

12. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

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



Welcome to CPWP and CPWP Associate Online Platform

CPWP Online Platform ▶

CPWP Associate Online Platform ▶

13. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

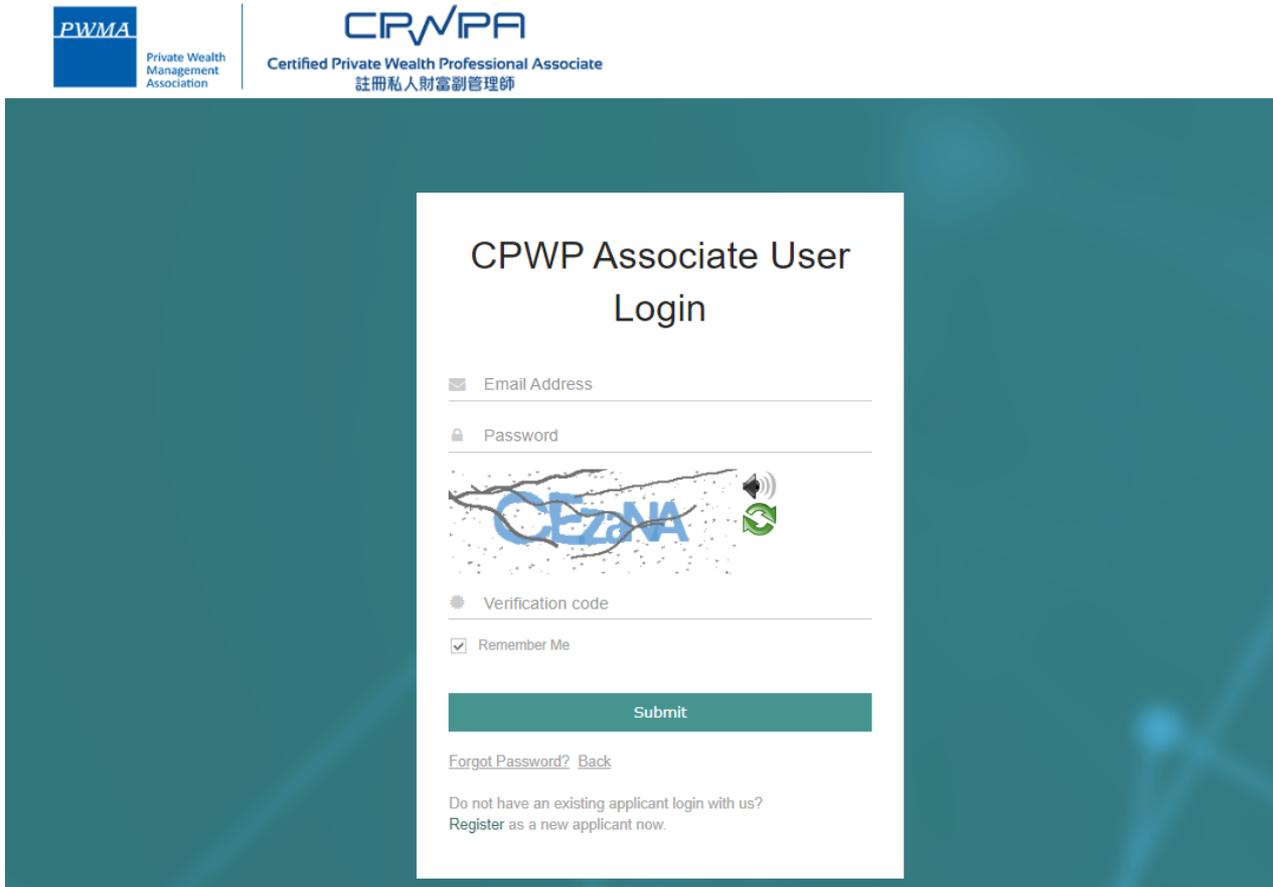
- Click [CPWP Associate User Login]



14. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Login to CPWP Associate Online Platform



PWMA Private Wealth Management Association

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

CPWP Associate User Login

✉ Email Address

🔒 Password

🔄 Verification code

Remember Me

Submit

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

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

15. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

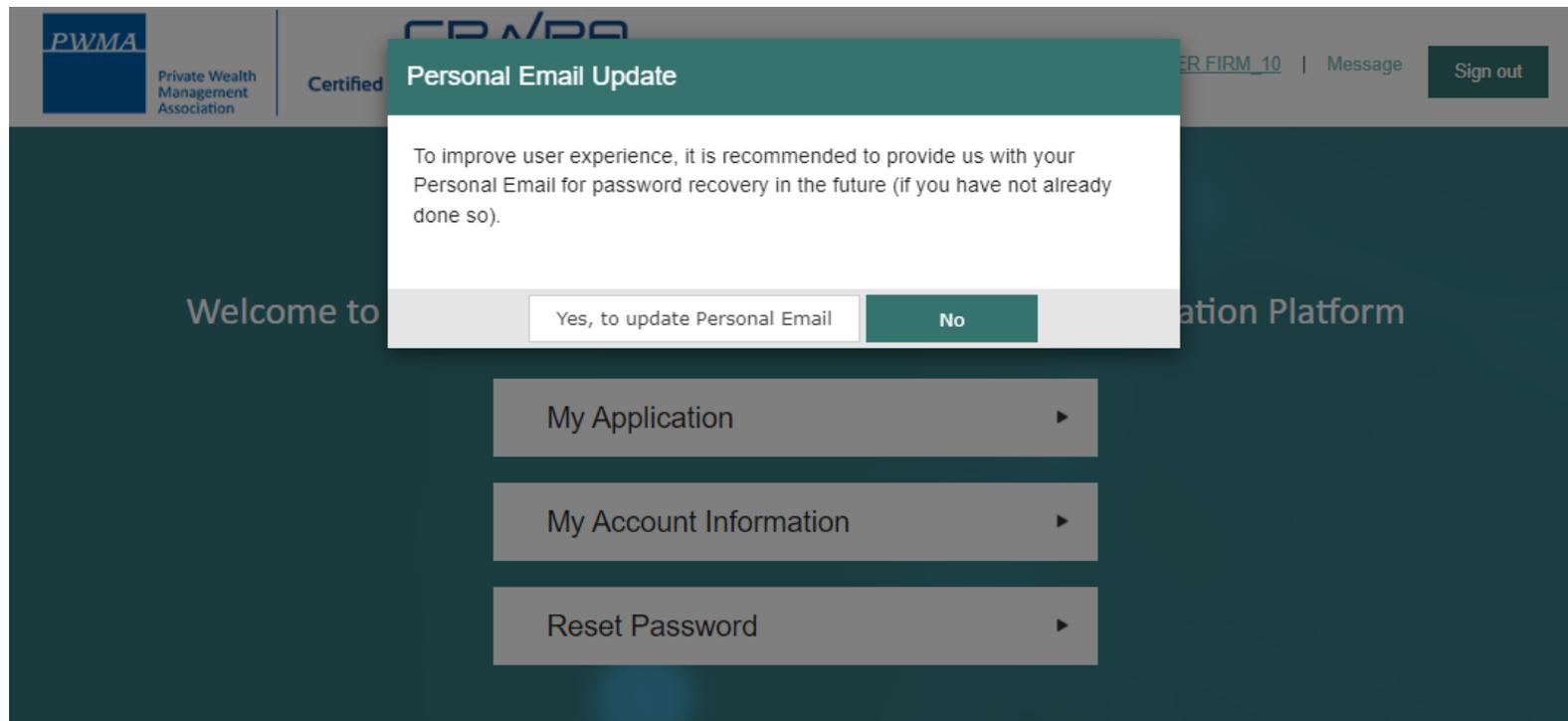
- Please change the random initial password upon first time login

The screenshot shows a web interface for the Certified Private Wealth Professional Associate (CPWPA) portal. At the top left is the PWMA logo. In the center is the CPWPA logo with the text 'Certified Private Wealth Professional Associate' and '註冊私人財富副管理師'. On the right, there is a user greeting 'Hi CPWPA MEMBER FIRM_10', a 'Message' link, and a 'Sign out' button. The main content area is a teal box containing a white 'Reset Password' form. The form has three input fields: 'Your Current Password:', 'New Password:', and 'Confirm Password:'. Below the fields are two buttons: '← Back' and 'Submit →'. At the bottom of the form, a red message reads 'First login, please change the initial password'.

16. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- If Applicant has already input personal email address, click [No] to close [Personal Email Update] prompt
- If Applicant has **NOT** input personal email address, please update personal email address by clicking [Yes, to update Personal Email]



17. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

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



Hi [CPWPA MEMBER FIRM_10](#) | [Message](#)

[Sign out](#)

Welcome to CPWP Associate Certification and Renewal Application Platform

My Application ▶

My Account Information ▶

Reset Password ▶

18. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Click [Apply for CPWP Associate] button

The screenshot displays the user interface of the CPWP Associate Online Platform. At the top left, the PWMA logo and the CPWPA logo (Certified Private Wealth Professional Associate) are visible. A navigation bar contains links for Home, My Application, My Account, Reset Password, and Message, along with a Sign out button. The main content area is titled 'My Application' and features a table with the following columns: Application No, Applicant Name, Date of Submission to PWMA, Application Status, and Action. The table is currently empty, displaying 'No records'. Below the table, a button labeled 'Apply for CPWP Associate' is highlighted with a red border.

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](#)

19. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Fill-in all required information in section 1 to 5 before clicking [submit] for Employer's verification (for employees of PWMA member firms only)
- Upload CPWP Module 1 and Module 2 official examination results or other relevant official results (if applicable) to Question 3

The screenshot shows the 'Apply for CPWP Associate' page on the CPWPA (Certified Private Wealth Professional Associate) platform. The page header includes the PWMA logo, CPWPA logo, and a welcome message: 'Welcome CPWPA.MEMBER.FIRM_10 to CPWP Associate Online Platform.' 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 indicator with five steps: 1. Qualifications, 2. Personal Particulars, 3. Current Employment, 4. Disciplinary Actions and Investigations, and 5. Acknowledgement. Step 1 is currently active.

Below the progress indicator, there is a section titled 'Please answer the following questions' with three 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_2
3. Have you passed and do you have valid results from within the last five years for one of the following combinations:
 - Passed **CPWP Module 1** examination (both paper 1 & 2) offered by Hong Kong Securities and Investment Institute "HKSI" **and CPWP Module 2** examination offered by Hong Kong Institute of Bankers "HKIB"; or
 - Completed "**CPWP Bridging Programme**" (i.e., passed the **post-training examination** organised by HKSI) and passed **CPWP Module 1 Paper 2** Examination; or
 - Passed the **In-house Accreditation Training Program for Module 1 and CPWP Module 2** Examination

At the bottom right of the form, there are two buttons: 'Save' and 'Next'.

20. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Click [save] button to complete the application later

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

Welcome [CPWPA MEMBER FIRM_10](#) 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_2

3. Have you passed and do you have valid results from within the last five years for one of the following combinations:

- Passed CPWP Module 1 examination (both paper 1 & 2) offered by Hong Kong Securities and Investment Institute "HKSI" and CPWP Module 2 examination offered by Hong Kong Institute of Bankers "HKIB"; or
 Please upload official examination results for BOTH CPWP Module 1 and CPWP Module 2 examinations
** The result of each examination paper is valid for 5 years (counting from the date of the examination) for the purpose of applying for CPWP Associate certification.
- Completed "CPWP Bridging Programme" (i.e., passed the post-training examination organised by HKSI) and passed CPWP Module 1 Paper 2 Examination; or
- Passed the In-house Accreditation Training Program for Module 1 and CPWP Module 2 Examination

Upload Files

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

- [Dummy_1989022389.docx](#) (Uploaded date: 2023-06-29) ✕

[Save](#) | [Next](#)

21. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Fill-in the start date under [Employment Period] and leave the end date blank

Welcome [CPWPA MEMBER FIRM_10](#) 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_2	Private Bank	Analyst	<input type="text"/> - <input type="text"/>	

Is this a Private Wealth Management Experience?
 Yes No

Save ✓ Previous Next

22. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Select the appropriate answers under [Disciplinary Actions and Investigations]

The screenshot shows the 'Apply for CPWP Associate' online platform. The page header includes the PWMA logo, the CRWPA logo (Certified Private Wealth Professional Associate), and a welcome message for a member firm. 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 indicator with five steps: 1. Qualifications, 2. Personal Particulars, 3. Current Employment, 4. Disciplinary Actions and Investigations (currently selected), and 5. Acknowledgement. Below the progress indicator is a section 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 '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 of the form, there are three buttons: 'Save' with a checkmark, 'Previous' with a left arrow, and 'Next' with a right arrow.

23. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Read the declaration carefully and check the Acknowledgement and Declaration box before clicking **[Submit]**

The screenshot shows the 'Apply for CPWP Associate' online platform. At the top, there are logos for PWMA (Private Wealth Management Association) and CPWPA (Certified Private Wealth Professional Associate / 註冊私人財富管理師). A navigation bar includes 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 indicator with five steps: 1 Qualifications, 2 Personal Particulars, 3 Current Employment, 4 Disciplinary Actions and Investigations, and 5 Acknowledgement (which is currently selected). The 'Acknowledgement and Declaration (Applicant)' section contains a list of statements for the applicant to confirm, each with a radio button. At the bottom right, there are three buttons: 'Save' with a checkmark, 'Previous' with a left arrow, and 'Submit' with a right arrow.

Welcome [CPWPA MEMBER FIRM 10](#) 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 confirm that I have read and understood the [PWMA Code of Ethics and Conduct](#) and agree to abide by it.
- 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 →

24. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Member firm applicant receives 'Your application has been submitted successfully' prompt

The screenshot displays the CPWP Associate Online Platform interface. At the top left, the PWMA logo (Private Wealth Management Association) and the CPWPA logo (Certified Private Wealth Professional Associate / 註冊私人財富副管理師) are visible. A navigation bar includes links for Home, My Application, My Account, Reset Password, Message, and Sign out. The main heading is 'Apply for CPWP Associate'. A teal banner at the top of the content area reads 'Your application has been submitted successfully'. Below this, a message states: '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-pointing arrow is located at the bottom of the message box.

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](#) →

25. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

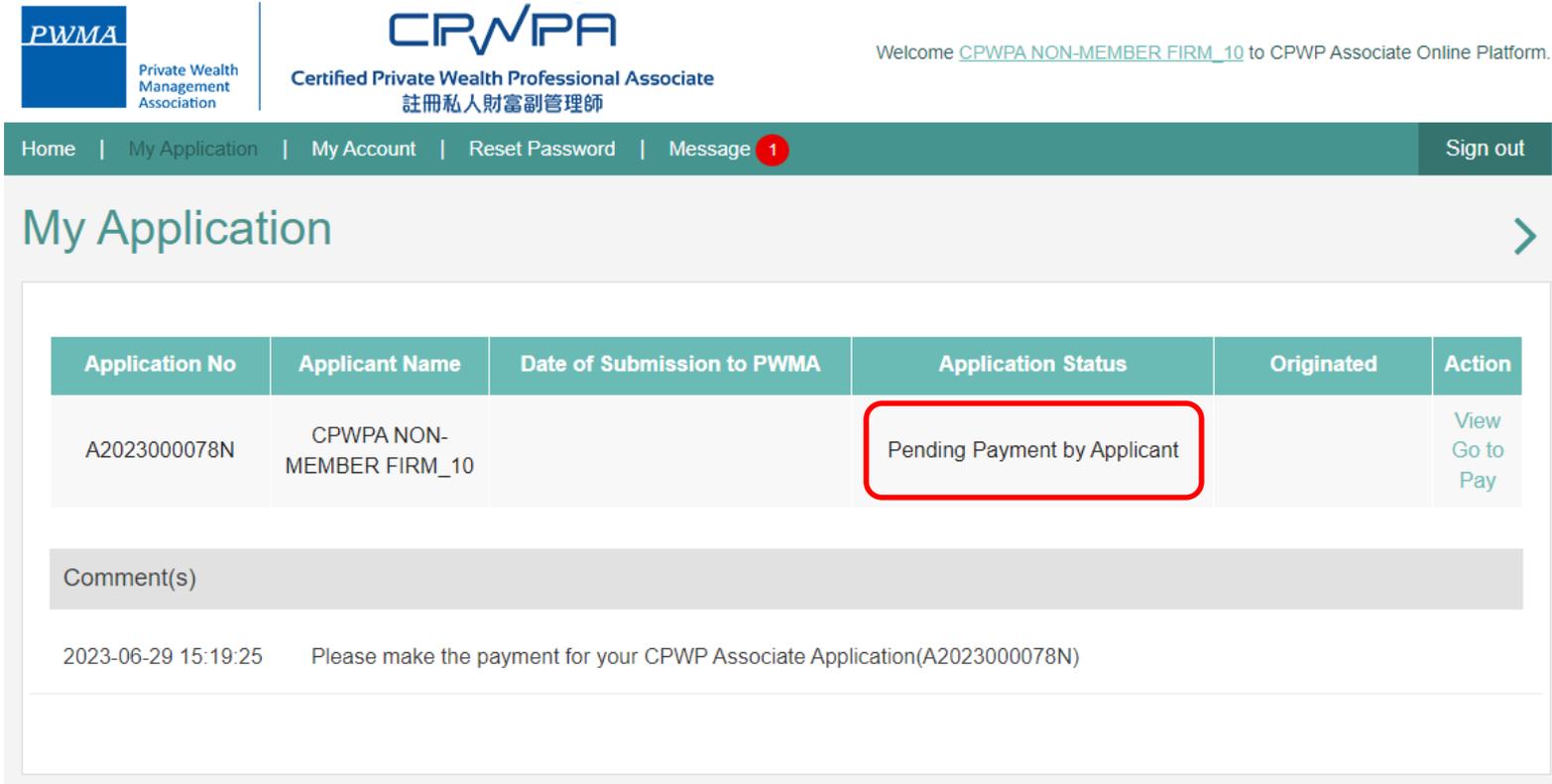
- Non-member firm applicant receives 'Your application has been submitted successfully' prompt, applicant clicks [Go to Pay Now] to proceed to payment **now**

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, 註冊私人財富副管理師). On the right, a welcome message reads: "Welcome [CPWPA NON-MEMBER FIRM_10](#) to CPWP Associate Online Platform." Below the logos is a navigation bar with links: Home | My Application | My Account | Reset Password | Message (with a red notification bubble containing the number 1) | Sign out. The main content area is titled "Apply for CPWP Associate" with a right-pointing arrow. A teal notification bar at the top of the content area states: "Your application has been submitted successfully". Below this, a light gray box contains the text: "Your application form will be sent to PWMA for processing after a non-refundable and non-transferable payment is received by PWMA. Please proceed to the payment." At the bottom of the content area are two buttons: "Go to Pay Now" with a right-pointing arrow, and "Back to Mainpage" with a right-pointing arrow.

26. New Applicant tracks Application Status

Apply for CPWP Associate procedures

- View **[Application Status]** under **[My Application]**



The screenshot shows the user interface of the CPWPA 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 NON-MEMBER FIRM_10 to CPWP Associate Online Platform." Below this is a navigation bar with links for Home, My Application, My Account, Reset Password, and Message (with a red notification bubble containing the number 1), and a Sign out button. The main content area is titled "My Application" and contains a table of application records. The table has columns for Application No, Applicant Name, Date of Submission to PWMA, Application Status, Originated, and Action. One record is shown with Application No A2023000078N, Applicant Name CPWPA NON-MEMBER FIRM_10, and Application Status Pending Payment by Applicant (highlighted with a red box). The Action column for this record contains links for View, Go to, and Pay. Below the table is a section for comments, with one comment from 2023-06-29 15:19:25 stating: "Please make the payment for your CPWP Associate Application(A2023000078N)".

Application No	Applicant Name	Date of Submission to PWMA	Application Status	Originated	Action
A2023000078N	CPWPA NON-MEMBER FIRM_10		Pending Payment by Applicant		View Go to Pay

Comment(s)

2023-06-29 15:19:25 Please make the payment for your CPWP Associate Application(A2023000078N)

27. Member Firm Applicant - if application fee is paid by Member Firm

Apply for CPWP Associate procedures

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

Dear Applicant,

Your CPWP Associate Application (Associate Application No: A20230000XXN) has been submitted to PWMA for processing.

The application fee has been paid by your bank.

Yours sincerely,

Private Wealth Management Association Limited

28. Member Firm Applicant - if application fee is paid by Applicant

Settles Payment by Credit Card or Bank Transfer or Cheque

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

Dear Applicant,

Application (A20230000XXN) has been verified by the relevant department of your bank, please proceed to make payment for your CPWP associate application.

Application No : A20230000XXN

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

29. Non-Member Firm Applicant – Applicant settles payment

Settles Payment by Credit Card or Bank Transfer or Cheque

- Upon clicking [Submit], Non-member firm applicant receives an email notification to settle payment

Dear Applicant,

Please proceed to make payment for your CPWP Associate application.

CPWP Associate Application No : A2023000078N

Please click the below link to pay now:

<https://www.pwma-cpwponline.com/CPWPAssociate/payment>

The invoice could be download here:

<https://www.pwma-cpwponline.com/CPWPAssociate/invoice>

Yours sincerely,

Private Wealth Management Association Limited

30. New Applicant settles Payment

If Payment is settled by Applicant

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





Welcome [CPWPA NON-MEMBER FIRM_10](#) 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	Originated	Action
A2023000078N	CPWPA NON-MEMBER FIRM_10		Pending Payment by Applicant		View Go to Pay

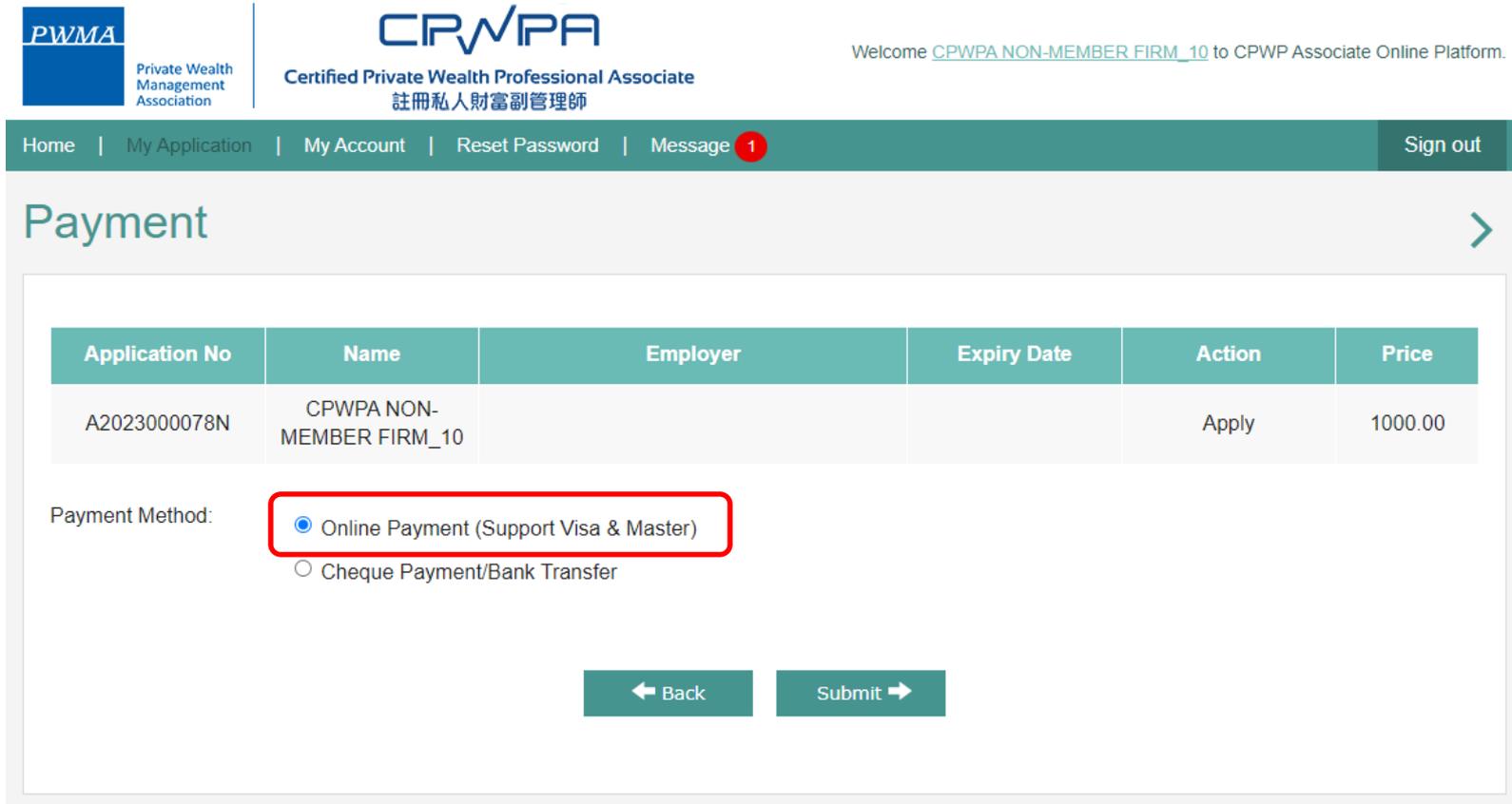
Comment(s)

2023-06-29 15:19:25 Please make the payment for your CPWP Associate Application(A2023000078N)

31. New Applicant settles Payment

If Payment is settled by Applicant's Credit Card

- Select Online Payment if applicant pays by Credit Card





Welcome [CPWPA NON-MEMBER FIRM_10](#) to CPWP Associate Online Platform.

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

Payment >

Application No	Name	Employer	Expiry Date	Action	Price
A2023000078N	CPWPA NON-MEMBER FIRM_10			Apply	1000.00

Payment Method:

Online Payment (Support Visa & Master)

 Cheque Payment/Bank Transfer

← Back
Submit →

32. 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 [CPWPA-NON-MEMBER-FIRM_10](#) to CPWP Associate Online Platform.

Online Payment

Please make sure your information are correct.

Application ID : A2023000078N

Name : CPWPA-NON-MEMBER-FIRM_10

Employer :

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 *

Payment Details

Card Type *

 Visa
  Mastercard

 JCB

Card Number *

Expiration Month * / Expiration Year *

CVN * 

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

Cancel
Next

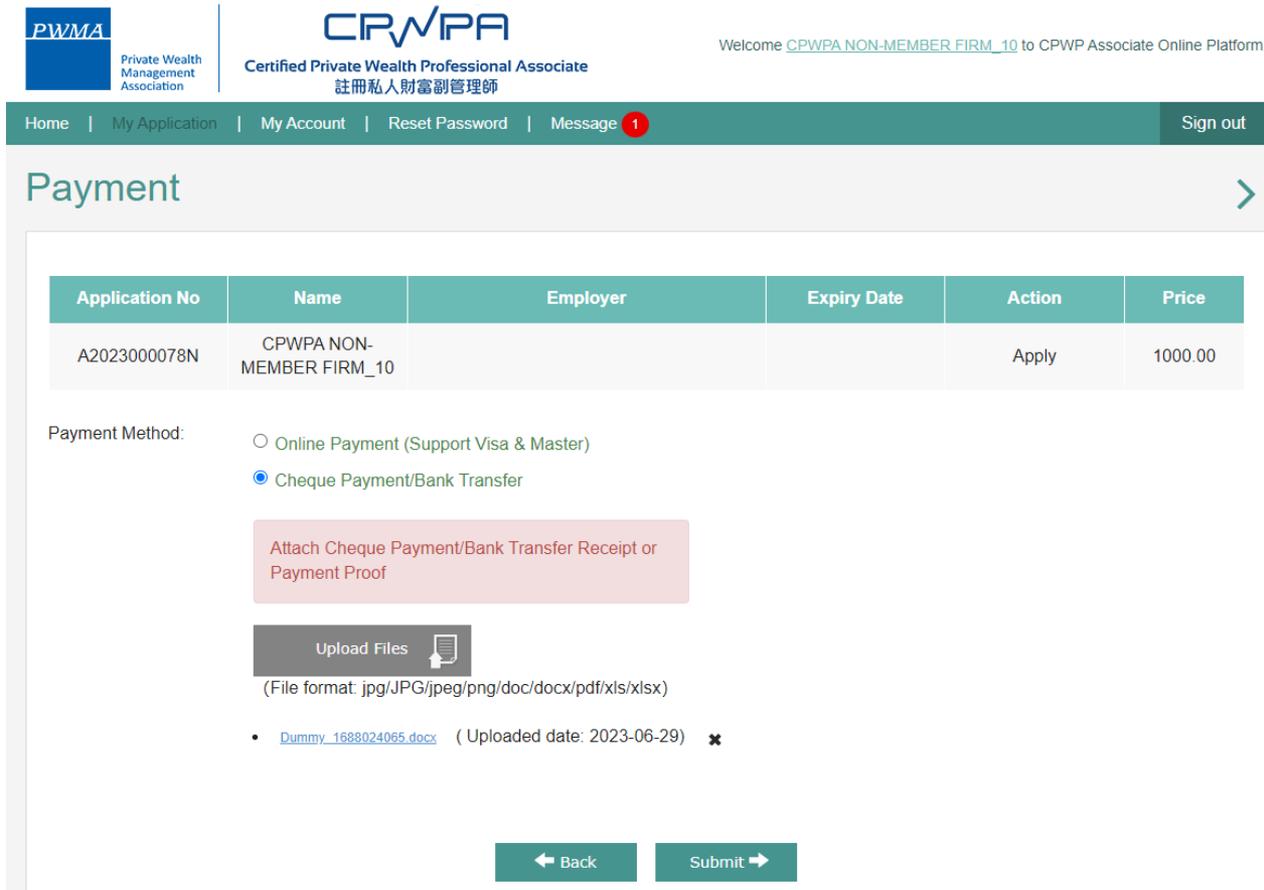
Your Order

Total amount HKD 1,000.00

33. 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]**



The screenshot shows the CPWPA Associate 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 NON-MEMBER FIRM_10 to CPWP Associate Online Platform." The navigation bar includes links for Home, My Application, My Account, Reset Password, Message (with a red notification icon), and Sign out.

The main content area is titled "Payment" and contains a table with the following data:

Application No	Name	Employer	Expiry Date	Action	Price
A2023000078N	CPWPA NON-MEMBER FIRM_10			Apply	1000.00

Below the table, the "Payment Method:" section has two options:

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

 A red box prompts the user to "Attach Cheque Payment/Bank Transfer Receipt or Payment Proof".

An "Upload Files" button is present, with a note: "(File format: jpg/JPG/jpeg/png/doc/docx/pdf/xls/xlsx)". Below this, a file upload record is shown:

- [Dummy_1688024065.docx](#) (Uploaded date: 2023-06-29) ✕

At the bottom, there are "Back" and "Submit" buttons.

34. New Applicant settles Payment

If Payment is settled by Cheque Payment or Bank Transfer

- Click **[Yes]** to submit CPWPA application

The screenshot displays the CPWPA application payment processing interface. A modal dialog box is centered on the screen, asking "Are you sure to continue?" with "Yes" and "No" buttons. The background interface includes a navigation bar with "Home", "My Application", and "My Account" links, and a "Sign out" button. Below the navigation bar, the "Payment" section is visible, featuring a table with application details and a payment method selection area.

Application No	Name	Employer	Expiry Date	Action	Price
A2023000078N	CPWPA NON-MEMBER FIRM_10			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_1688024065.docx](#) (Uploaded date: 2023-06-29) ✕

Navigation buttons: Back, Submit

35. New Applicant settles Payment

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

The screenshot displays the CPWPA 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 / 註冊私人財富副管理師). On the right, a welcome message reads: "Welcome CPWPA NON-MEMBER FIRM_10 to CPWP Associate Online Platform." Below the logos is a navigation bar with links: 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 features a teal confirmation banner: "Your application has been submitted successfully". Below this banner is a light gray box containing a large green checkmark icon, the text "Thank you for your payment!", and "This CPWP Associate application has been submitted to PWMA for processing." At the bottom center of this box is a teal button labeled "Back to Mainpage" with a right-pointing arrow.

36. Applicant receives CPWPA Certification result and download 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 Applicant,

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_detail/261 is hereby granted to you with expiry date till 31 December 2024.

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

37. Applicant receives CPWPA Certification result and download CPWPA e-certificate

After approval granted by Accreditation and Exemption Committee

- View Certificate's expiry date and the e-certificate in **[My Certification]**
- Go to **[My Application]** to view Application Status

The screenshot displays the user interface of the CPWPA Associate Certification and Renewal Application Platform. At the top left, the PWMA logo and 'Private Wealth Management Association' are visible. In the center, the CPWPA logo and 'Certified Private Wealth Professional Associate' (with Chinese characters '註冊私人財富副管理師') are shown. On the top right, the user is identified as 'Hi CPWPA NON-MEMBER FIRM_10', with a 'Message' notification showing 5 unread items and a 'Sign out' button. The main content area features 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 / Apply for Renewal' (with an expiry date of 2024-12-31), 'My Account Information', and 'Reset Password'.

38. Applicant receives CPWPA Certification result and download 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, there is a navigation bar with links for Home, My Application, My Certification, My Account, Reset Password, Message (with a red notification bubble containing the number 5), 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	Originated	Action
A2023000078N	CPWPA NON-MEMBER FIRM_10	2023-06-29	Approved		View

Below the table, there is a section for 'Comment(s)'. The comment text is: '2023-06-29 15:45:07 Granting of Certified Private Wealth Professional ("CPWP") Associate Certification (CPWP Associate Certification No. : A2023000081)'.

39. Applicant receives CPWPA Certification result and download CPWPA e-certificate

After approval granted by Accreditation and Exemption Committee

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



The screenshot displays the CPWPA 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 / 註冊私人財富副管理師). On the right, a welcome message reads: "Welcome [CPWPA NON-MEMBER FIRM_10](#) to CPWP Associate Online Platform."

A navigation bar at the top contains the following items: Home | My Application | My Certification | My Account | Reset Password | Message **5** | Sign out.

The main content area is titled "My Certification" with a right-pointing arrow. Below this is a table with the following data:

CPWPA No.	Name	Member Firm	Certification Status	Effective Till	Action
A2023000081	CPWPA NON-MEMBER FIRM_10	ABC Asset Management Limited	Certified	2024-12-31	<ul style="list-style-type: none"> ▶ View ▶ Update Account Information

40. Applicant receives CPWPA Certification result and download CPWPA e-certificate

Online CPWP Associate electronic certificate is available

