

CPWPA Online Platform

CPWP Associate Certification Renewal Application User Guide for University Student Applicant

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1.0 CPWPA Certification Renewal Process

Login to the CPWPA Online Platform by clicking <https://www.pwma-cpwponline.com/associate/login>.

PWMA Private Wealth Management Association

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

CPWP Associate User Login

Email Address

Password

Verification code

Remember Me

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

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

1.1 Renewal Process – Applicant examines the expiry date

To renew, please examine the CPWPA expiry date before clicking **[My Certification/Apply for Renewal]**

The screenshot shows the user interface of the CPWPA Associate Certification and Renewal Application Platform. The header includes the PWMA logo, the CPWPA logo, and the text "Certified Private Wealth Professional Associate" and "註冊私人財富副管理師". The user is logged in as "CPWPA STUDENT_10" and has 5 messages. A "Sign out" button is visible. The main content area displays a welcome message and a list of navigation options: "My Application", "My Certification / Apply for Renewal (Expiry Date: 2022-12-31)", "My Account Information", and "Reset Password". The "My Certification / Apply for Renewal" option is highlighted with a red box.

PWMA Private Wealth Management Association

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

Hi CPWPA STUDENT_10 | Message 5 Sign out

Welcome to CPWP Associate Certification and Renewal Application Platform

- My Application ▶
- My Certification / Apply for Renewal ▶**
(Expiry Date: 2022-12-31)
- My Account Information ▶
- Reset Password ▶

1.2 Apply for CPWPA Certification Renewal

Click [Apply for Renewal] to start the renewal process



Welcome [CPWPA STUDENT_10](#) to CPWP Associate Online Platform.

Home | My Application | My Certification | My Account | Reset Password | Message 5 | Sign out

My Certification >

CPWPA No.	Name	University	Certification Status	Effective Till	Action
A2023000080	CPWPA STUDENT_10	Lingnan University	Expired	2022-12-31	<ul style="list-style-type: none"> ▶ Apply for Renewal ▶ View ▶ Update Account Information

1.3 Fill-in “Employment Update”

- Click [here] to update your information if there is any change of employment during the year
- Click “No, Continue my renewal application” to proceed if there is no change of employment

The screenshot displays the CPWPA Associate Online Platform interface. A modal dialog box titled "Employment Update" is centered on the screen. The dialog contains the text: "If your employer have changed, please click [here](#) to update your account information and verify." Below the text is a button labeled "No, Continue my renewal application".

The background shows the "Certification Renewal" page. The top navigation bar includes the PWMA logo, "Home", "My Application", "My Cert", and "Sign out". The main content area features a progress bar with four steps: 1. Update Personal Particulars, 2. Update Education Status and Ongoing Professional Training Hours, 3. Update Disciplinary Actions and Investigations, and 4. Acknowledgement. Below the progress bar is a heading: "Complete CPWP Associate Certification Application below (name should match your HKID/passport record)".

The "Personal Particulars" section includes three input fields:

- Family Name *: CPWPA (Remark: The name should match your HKID/passport record.)
- Given Name *: STUDENT_10 (Remark: The name should match your HKID/passport record.)
- First 4 digits of HKID Card Number *: 1234 (Remark: The number should match your HKID record.)

1.4 Renewal Process – Applicant updates Personal Particulars

Review [Personal Particulars] and update personal information, if necessary

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 STUDENT_10 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 5), and Sign out. The main content area is titled "Certification Renewal" with a right-pointing arrow. Below the title is a progress bar with four steps: 1. Update Personal Particulars (highlighted in green), 2. Update Education Status and Ongoing Professional Training Hours, 3. Update Disciplinary Actions and Investigations, and 4. Acknowledgement. A green banner below the progress bar contains the instruction: "Complete CPWP Associate Certification Application below (name should match your HKID/passport record)". Underneath, the "Personal Particulars" section contains three input fields: "Family Name *:" with the value "CPWPA", "Given Name *:" with the value "STUDENT_10", and "First 4 digits of HKID Card Number *:" with the value "1234".

1.5 Fulfillment of the “10 hours of Ongoing Professional Training hours”

- Check the box “10 OPT hours” in the [Update Education Status and Ongoing Professional Training Hours] If this box is NOT checked, a prompt will pop up to inform the Applicant about the terms and conditions
- Upload official training records

www.pwma-cpwponline.com says

You did not fulfil the CPWP Associate Certification Renewal Requirement and your application is subject to consideration. More information may be required from you by PWMA. If you wish to continue, any fees and charges paid with this submission are non-refundable and non-transferable. Please also be aware that additional fees and charges may apply as a condition for your renewal. In case of doubt, please reach PWMA.

OK

Cancel

Certification Renewal >

1 Update Personal Particulars
2 Update Education Status and Ongoing Professional Training Hours
3 Update Disciplinary Actions and Investigations
4 Acknowledgement

■ Update Employment Status and Ongoing Professional Training Hours

Are you currently employed by a PWMA member institution?

No

I have taken at least 10 hours of Ongoing Professional Training (“OPT”) hours as required by the PWMA with details indicated in the Guidelines of CPWPA Certification Renewal available at www.pwma.org.hk.

Upload official training record:

Upload Files

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

Your current employment / education status: University Students

University	Faculty	Year of Study	Study Period MM/DD/YY	Number of Years and Months in Study
Lingnan University	Business	3	06/01/2021 -	2 year(s)

Please provide details of each relevant training course you have attended during the year and upload the attendance record of each training as supporting document.

#Please click [SAVE] after uploading files in [Upload Attendance Record]#

Date of Training	Name of Training Course	Organizer of Training	Number of Training Hours Attended	Upload Attendance Record
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<div style="border: 1px solid #ccc; background-color: #f0f0f0; padding: 5px; display: inline-block;"> Upload Files </div>

+ Add more training course(s) attended

Save ✓
← Previous
Next →

1.6 Update of [Disciplinary Actions and Investigations, Financial Status and Character]

Review [Update Disciplinary Actions and Investigations, Financial Status and Character] and provide supporting document if answered “Yes” to any questions

1 Update Personal Particulars	2 Update Education Status and Ongoing Professional Training Hours	3 Update Disciplinary Actions and Investigations	4 Acknowledgement
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Disciplinary Actions and Investigations, Financial Status and Character

Incident(s) of “disciplinary actions and investigations, financial status and character” previously notified to PWMA:

Other than the above incidence(s) previously notified to PWMA, please answer the following questions:

- Have you ever been reprimanded, censured, disciplined by any professional or regulatory authority?

Yes No
- 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
- 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
- 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
- Have you ever been adjudged bankrupt, or served with a bankruptcy petition?

Yes No

Save ✓ ← Previous Next →

1.7 [Acknowledgement and Declaration]

Must check the box after carefully review the content of [Acknowledgement and Declaration] before clicking [Submit]

The screenshot displays 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 navigation bar includes links for Home, My Application, My Certification, My Account, Reset Password, Message (with a red notification icon), and Sign out. The main content area is titled 'Certification Renewal' and shows a progress bar with four steps: 1. Update Personal Particulars, 2. Update Education Status and Ongoing Professional Training Hours, 3. Update Disciplinary Actions and Investigations, and 4. Acknowledgement (which is currently selected and highlighted in green). Below the progress bar, the 'Acknowledgement and Declaration' section contains a list of statements with checkboxes:

- I declare that all information I have provided in this form is true and correct.
- I understand that the paid fees are non-refundable and non-transferable.
- I authorise 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.
- Check this box to indicate that you have read, understood, and agreed to the above acknowledgement and declaration.

At the bottom right, there are three buttons: 'Save' (with a checkmark icon), '← Previous', and 'Submit →' (which is circled in red).

1.8 Renewal online application submitted by individual applicant

- After clicking [Submit], applicant will receive a “Your application has been submitted successfully” message.
- The CPWPA renewal application will be sent to the PWMA after the payment is settled

The screenshot displays the CPWPA Associate Online Platform interface. At the top left, the PWMA logo and the text 'Private Wealth Management Association' are visible. In the center, the CPWPA logo and the text 'Certified Private Wealth Professional Associate' and '註冊私人財富副管理師' are shown. On the right, a welcome message reads 'Welcome CPWPA STUDENT 10 to CPWP Associate Online Platform.' Below the header is a navigation bar with links for 'Home', 'My Application', 'My Certification', 'My Renewal Application', 'My Account', 'Reset Password', 'Message' (with a red notification bubble containing the number 6), and 'Sign out'. The main content area is titled 'Renewal for CPWP Associate' and features a green success message: '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 renewal has **not** been completed. Your renewal form will be sent to PWMA for processing after a non-refundable and non-transferable payment is received at PWMA. Please proceed to the payment.' At the bottom, there are two buttons: 'Go to Pay Now' and 'Back to Mainpage', both with right-pointing arrows.

2.0 Applicant settles CPWPA Renewal Fee

Upon clicking [Submit], applicant would receive a notification email for payment.

In this case, applicant can settle payment by Credit Card or Cheque/Bank Transfer:

- Click the “link to pay now” to login to the CPWP Associate online platform to settle payment
- Download an invoice via the link

Dear Applicant,

Please proceed to make payment for your CPWP Associate Renewal Application.

CPWP Associate Renewal Application No : A20230000XXR

Please click the below link to pay now:

<https://www.pwma-cpwponline.com/test/associate/pay/148/2>

The invoice could be download here:

<https://www.pwma-cpwponline.com/test/associate/invoice/148/2>

Yours sincerely,

Private Wealth Management Association Limited

2.1 To settle CPWPA Renewal Application Fee

To settle the renewal fee after receiving the email notification:

- Login to <https://www.pwma-cpwponline.com/associate/login>
- Click [My Renewal Application]

The screenshot shows the user interface of the CPWPA Associate Certification and Renewal Application Platform. At the top left, there is the PWMA logo and the text "Private Wealth Management Association". In the center, the CPWPA logo is displayed above the text "Certified Private Wealth Professional Associate" and "註冊私人財富管理師". On the top right, the user is logged in as "Hi CPWPA STUDENT_10" and has a "Message" notification with a red circle containing the number "6". A "Sign out" button is also visible.

The main content area is a dark teal background with the following text and menu items:

Welcome to CPWP Associate Certification and Renewal Application Platform

- My Application ▶
- My Certification / Apply for Renewal ▶
(Expiry Date: 2022-12-31)
- My Renewal Application ▶
- My Account Information ▶
- Reset Password ▶

2.2 Click [Go to pay] and choose payment method

- Select [My Renewal Application]
- Click [Go to Pay] to select one of the following payment methods:
 - Credit card payment
 - Cheque payment
 - Bank transfer

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 STUDENT_10 to CPWP Associate Online Platform." Below the logos is a navigation menu with items: Home, My Application, My Certification, My Renewal Application, My Account, Reset Password, Message (with a red notification bubble containing the number 6), and Sign out.

The main content area is titled "Certification Renewal" and includes search filters for Status and Application Name, a Page dropdown, and a search icon. Below this is a table with the following data:

Application No	Applicant Name	Date of Submission to PWMA	Application Status	Action
A2023000040R	CPWPA STUDENT_10		Pending Payment by Applicant	View Go to Pay

At the bottom of the table, there are pagination controls: <<, <, 1, >, >>, and Total:1. The "Go to Pay" button in the Action column is highlighted with a red rectangle.

2.3 Cheque Payment/Bank Transfer

Applicant can settle payment by cheque or bank transfer via online banking:

- Select [Cheque Payment/Bank Transfer]
- Transfer payment via Online Banking or ATM machine, please be reminded to retain the receipt. Or write a cheque payable to “Private Wealth Management Association Limited” and scan a cheque copy before mailing it to PWMA office
- Upload Cheque copy/Bank Transfer receipt before clicking [Submit]

Payment >

Application No	Name	University	Expiry Date	Action	Price
A2023000040R	CPWPA STUDENT_10	Lingnan University	2022-12-31	Renewal	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_1688032884.docx
(Uploaded date: 2023-06-29) ✕

← Back
Submit →

2.4 Credit Card payment

Choose [Online Payment] to settle renewal fee by 3 types of credit cards (Visa, Mastercard or JCB)





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

Welcome [CPWPA STUDENT_10](#) to CPWP Associate Online Platform.

Home | My Application | My Certification | My Renewal Application | My Account | Reset Password | Message 6
Sign out

Payment >

Application No	Name	University	Expiry Date	Action	Price
A2023000040R	CPWPA STUDENT_10	Lingnan University	2022-12-31	Renewal	500.00

Payment Method:

Online Payment (Support Visa & Master)

Cheque Payment/Bank Transfer

← Back
Submit →

2.5 Choose [Confirm Payment] under Credit Card payment

Choose [Confirm Payment]



Private Wealth
Management
Association



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

Welcome [CPWPA STUDENT_10](#) to CPWP Associate Online Platform.

Online Payment >

Please make sure your information are correct.

Application ID :	A2023000040R
Name :	CPWPA STUDENT_10
Employer :	Lingnan University
Charge :	HK\$ 500.00

[← 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.

  

2.6 Fill-in Billing info and Payment Details to proceed Credit Card payment

Fill-in [Billing Information] and [Payment Details] before clicking [Next]

Billing Information

* Required field

First Name *

Last Name *

Address Line 1 *

City *

Country/Region *

Email *

Your Order

Total amount **HKD 500.00**

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.

2.7 Renewal Process – Applicant submits payment and application to PWMA

After the payment transaction is completed successfully, the renewal application will be sent to PWMA

Applicant will receive 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 STUDENT_10 to CPWP Associate Online Platform." Below the logos is a navigation bar with links: Home, My Application, My Certification, My Renewal Application, My Account, Reset Password, Message (with a red notification bubble containing the number 7), and Sign out. The main content area is titled "Payment" and features a teal banner with the message: "Your application has been submitted successfully". Below this banner is a large light gray box containing a green checkmark icon, the text "Thank you for your payment!", and "The CPWP Associate renewal 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.

3.0 Application Status – Renewal application submitted to PWMA

Receive an email notification “Your CPWP Associate Renewal Application(A20230000XXR) has been submitted to PWMA” after payment

Dear APPLICANT,

Your CPWP Associate Renewal Application (Associate Renewal Application No: A20230000XXR) has been submitted to PWMA for processing.

Yours sincerely,

Private Wealth Management Association Limited

3.1 Download a Receipt for Reimbursement

After the payment is received by PWMA, a receipt for reimbursement can be downloaded.

- Receive an email of “Receipt of CPWP Associate Renewal Application (A20230000XXR)” after the payment is confirmed by PWMA
- Login to CPWP Associate online platform to download a receipt for reimbursement

Dear Applicant,

Thank you for your Payment!

This is to confirm that a CPWP Associate Certification Renewal Application A2023000040R was received from Applicant at PWMA together with a non-refundable payment of HKD 500.00.

For the purposes of your reimbursement, please download the receipt from below link:

<https://www.pwma-cpwponline.com/test/associate/receipt/148?type=2>

Yours sincerely,

Private Wealth Management Association Limited

4.0 Results of CPWP Associate Certification Renewal Application

Upon approval granted by Accreditation and Exemption Committee, Applicant will receive:

- An email of “CPWP Associate Renewal Application(A20230000XXR) is approved by PWMA”

Dear Applicant,

CPWPA Renewal Application (A20230000XXR) is approved

With respect to your renewal application for CPWP Associate Certification (CPWP Associate Certification No. : A20230000XX) for the purpose of the Enhanced Competency Framework, we are pleased to confirm that you have fulfilled the requirements for certification renewal. Your CPWPA certification https://www.pwma-cpwponline.com/associate/certification_detail/ is hereby extended with expiry date till 31 December 2023.

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. You should also submit to us the Online Application Form for CPWP Associate Certification Renewal (On-going Professional Training) within 1 month following the expiry of your certification.

We would like to remind you that you should read, understand and comply with 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 quote the CPWPA number for any future correspondence with us.

Yours sincerely,

Private Wealth Management Association Limited

4.1 Certification Status

To view the Certification Status under [My Certification]

- Login to <https://www.pwma-cpwponline.com/associate/login>
- Choose [My Certification] to view the [Certification Status] and [Effective Till] Date



Welcome [CPWPA STUDENT_10](#) to CPWP Associate Online Platform.

Home | My Application | My Certification | My Renewal Application | My Account | Reset Password | Message 10 | Sign out

My Certification >

CPWPA No.	Name	University	Certification Status	Effective Till	Action
A2023000080	CPWPA STUDENT_10	Lingnan University	Certified	2023-12-31	<ul style="list-style-type: none"> ▶ Renewal History ▶ View ▶ Update Account Information

4.2 Download CPWP Associate Electronic Certificate

Online CPWP Associate Electronic Certificate is available

- Login to <https://www.pwma-cpwponline.com/associate/login>
- Click [View] under [My Certification] to download electronic certificate

