

# CPWPA Online Platform

## CPWP Associate Certification Renewal Application User Guide for Applicant

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# 1. 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

 b46rp5

Verification code

☒ Remember Me

Submit

[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 displays the user interface of the CPWPA Associate Certification and Renewal Application Platform. At the top, the PWMA logo is on the left, followed by the CPWPA logo and the text 'Certified Private Wealth Professional Associate' and '註冊私人財富副管理師'. On the right, the user is logged in as 'Hi CPWPA APPLICANT' with a 'Message' icon showing 3 notifications and a 'Sign out' button. The main content area has a teal background with the text 'Welcome to CPWP Associate Certification and Renewal Application Platform'. Below this, there is a vertical list of four white buttons with right-pointing chevrons: 'My Application', 'My Certification / Apply for Renewal' (which is highlighted with a red rectangular border and includes the text '(Expiry Date: 2025-12-31)'), 'My Account Information', and 'Reset Password'.

## 1.2. Apply for CPWPA Certification Renewal

- Click [Apply for Renewal] to start the renewal process



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 [My Account](#) | 
 [Reset Password](#) | 
 [Message](#) 3 | 
 [Apply for CPWP upgrade](#)
[Sign out](#)

## 1.3. Fill-in “Employment Update”

- Fill-in “Employment Update” 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 this text is a button labeled "No, Continue my renewal application".

The background interface shows the PWMA logo and navigation links: Home, My Application, My Certification, and My Profile. The main heading is "Certification Renewal". Below the heading is a progress bar with four steps: 1. Update Personal Particulars, 2. Update Employment Status and Ongoing Professional Training Hours, 3. Update Disciplinary Actions and Investigations, and 4. Acknowledgement. The first step is currently active.

Below the progress bar is a section titled "Complete CPWP Associate Certification Application below (name should match your HKID/passport record)". Under this section is the "Personal Particulars" form with the following fields:

- Family Name \*: CPWPA (Remark: The name should match your HKID/passport record.)
- Given Name \*: APPLICANT (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.)
- First 4 digits of Passport Number: (If no HKID Card) (Remark: The number should match your Passport record.)

## 1.4. Renewal Process – Applicant updates Personal Particulars

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



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### Certification Renewal >

1 Update Personal Particulars

2 Update Employment Status and Ongoing Professional Training Hours

3 Update Disciplinary Actions and Investigations

4 Acknowledgement

☐ Complete CPWP Associate Certification Application below (name should match your HKID/passport record)

#### Personal Particulars

## 1.5. Fulfillment of the “10 hours of On-going Professional Training hours (OPT)”

- Check the box “10 OPT hours” in the [Update Employment Status and On-going 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 if Applicant is not working at PWMA Member Institution

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 Employment 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?

Yes

Which PWMA member institution? MEMBER FIRM

☐ 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](http://www.pwma.org.hk).

Upload official training record:

Upload Files

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

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="background-color: #ccc; padding: 5px; display: flex; align-items: center; gap: 10px;"> <span>Upload Files</span> </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 any “Yes” is selected

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

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]



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### Certification Renewal >

1 Update Personal Particulars

2 Update Employment Status and Ongoing Professional Training Hours

3 Update Disciplinary Actions and Investigations

4 Acknowledgement

#### Acknowledgement and Declaration

- 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](http://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.

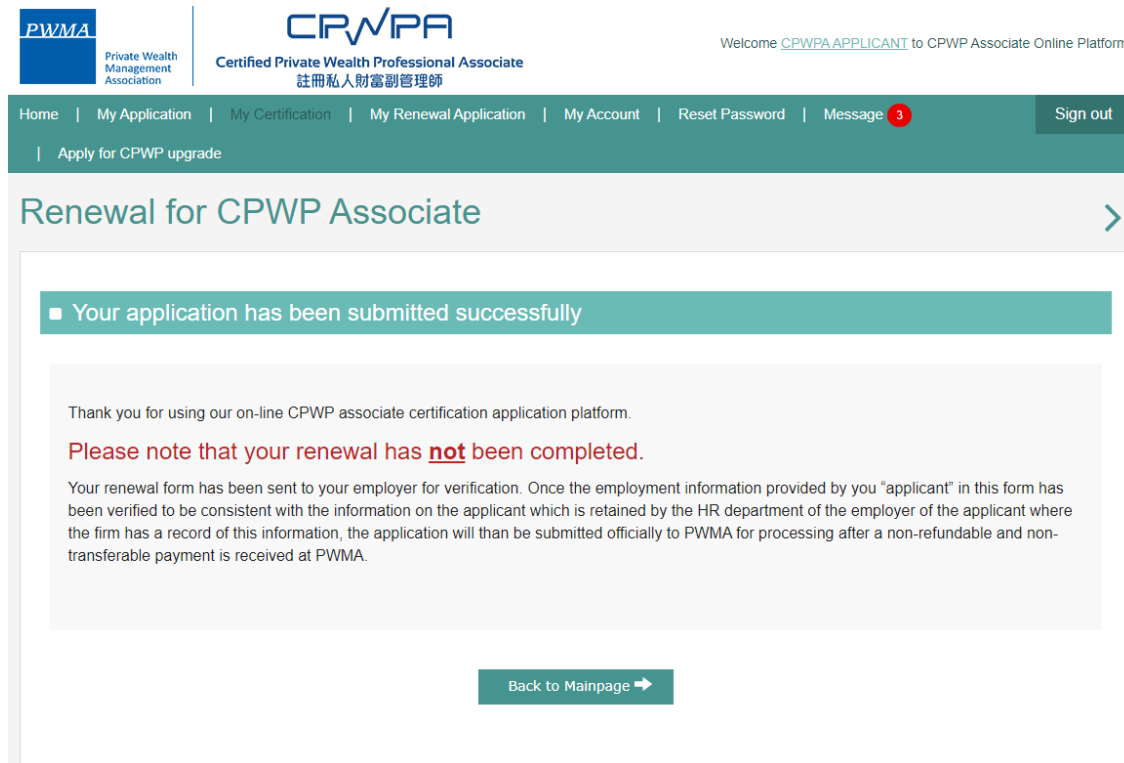
Save ✓

← Previous

Submit →

## 1.8. Renewal online application submitted to a PWMA Member Institution

- After clicking [Submit], applicant will receive a message “Your application has been submitted successfully”.
- For those applicants who are employed by PWMA Member Institutions, the renewal application will be sent to the employer’s relevant department for verification. Please note that the renewal application is not yet submitted to PWMA at this stage. To track the application status, please go to page 10.



The screenshot displays the CPWPA Associate Online Platform interface. At the top, the PWMA and CPWPA logos are visible, along with the text "Certified Private Wealth Professional Associate" and "註冊私人財富管理師". A welcome message reads: "Welcome CPWPA APPLICANT to CPWP Associate Online Platform." The navigation bar includes links for Home, My Application, My Certification, My Renewal Application, My Account, Reset Password, and Message (with a red notification icon showing 3). A "Sign out" button is also present. Below the navigation bar, the main heading is "Renewal for CPWP Associate". A teal banner states: "Your application has been submitted successfully". Below this, a message reads: "Thank you for using our on-line CPWP associate certification application platform." A red text box highlights: "Please note that your renewal has not been completed." The text explains that the renewal form has been sent to the employer for verification and will be submitted to PWMA after a non-refundable and non-transferable payment is received. A "Back to Mainpage" button with a right arrow is at the bottom.

## 1.9. Member Institution verified application and settled the payment for applicant

### Renewal application has been verified by Member Institution with payment settled

- Applicant can track the application status to see if the renewal application has been verified by Member Institution under **[My Renewal Application]**
- Applicant will see the application status changed to [Submitted to PWMA] after payment is settled by Member Institution



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[Home](#) | [My Application](#) | [My Certification](#) | [My Renewal Application](#) | [My Account](#) | [Reset Password](#) | [Message](#) 10 | [Sign out](#)
[Apply for CPWP upgrade](#)

Status  Application Name  Page

## 2. Applicant may be requested by Member Institution to settle Renewal Fee upon verification

Upon verification by Member Institution, Member Institution may request Individual Applicant to settle fee payment.

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

- Applicant will receive an email notification **“CPWP Associate Renewal Application (A2025000XXR) has been verified by a member firm. Please proceed to make payment in [My Renewal Application].”**
- Click the “link to pay now” to login to the CPWP Associate online platform to settle payment
- Download an invoice to view the remittance information and request for reimbursement:

Dear Applicant

CPWP Associate Renewal Application A2025000XXR has been verified by the relevant department of you bank, please proceed to make payment for your CPWP Associate renewal application.

CPWP Associate Renewal Application No.: A20250000XXR

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/associate/invoice>

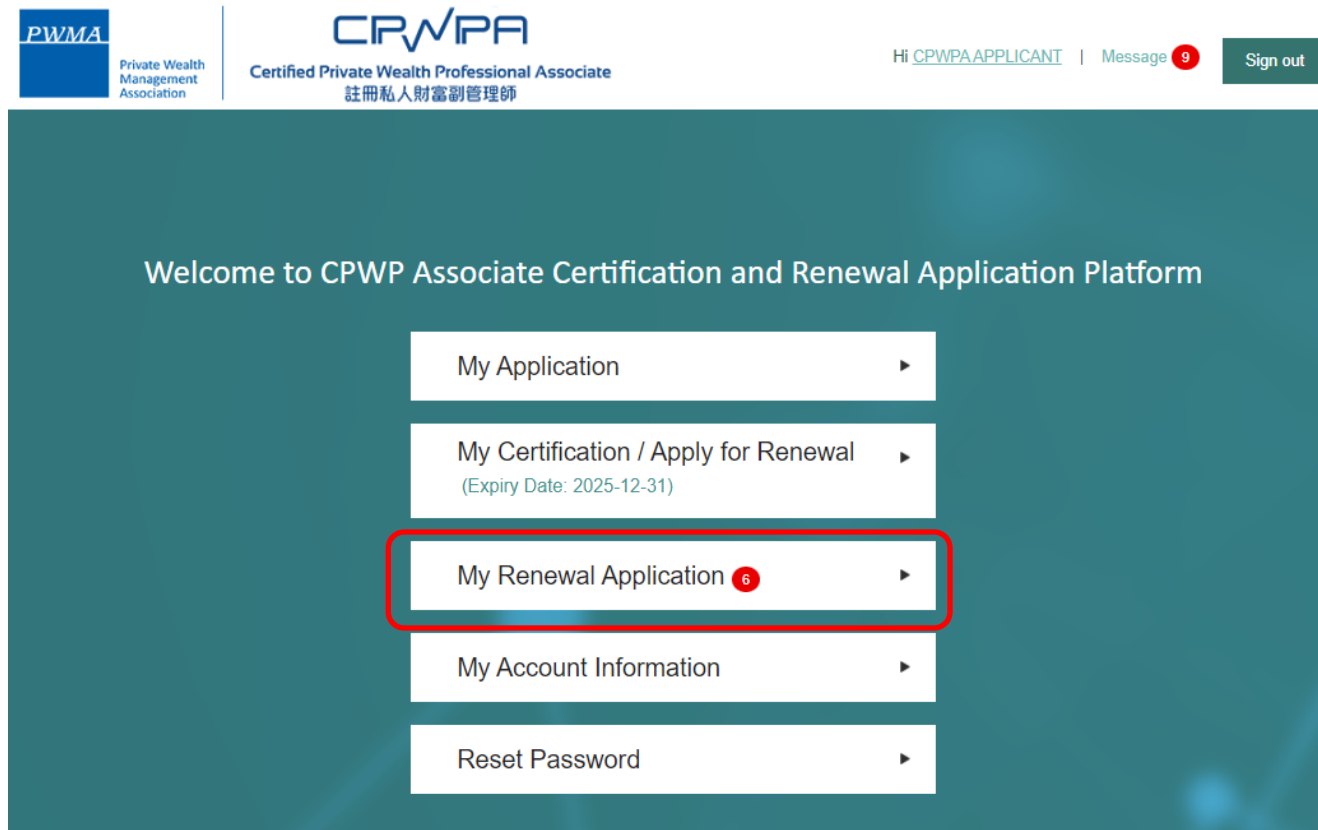
Yours sincerely,

Private Wealth Management Association Limited

## 2.1 To settle CPWPA Renewal Application Fee

To settle the renewal fee after receiving the email notification from Member Institution:

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



## 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 (Visa / Mastercard / JCB)
  - Cheque payment
  - Bank transfer



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### Certification Renewal

Status ▼
 Application Name
 Page ▼
Q
>

| Application No | Applicant Name  | Date of Submission to PWMA | Application Status           | Action                                            |
|----------------|-----------------|----------------------------|------------------------------|---------------------------------------------------|
| A2025000038R   | CPWPA APPLICANT | 2025-11-05                 | Pending Payment by Applicant | <a href="#">View</a><br><a href="#">Go to Pay</a> |

<<
<
1
>
>>
Total:2

## 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            | Employer    | Expiry Date | Action  | Price   |
|----------------|-----------------|-------------|-------------|---------|---------|
| A2025000038R   | CPWPA APPLICANT | MEMBER FIRM | 2025-12-31  | Renewal | 1000.00 |

Payment Method:

☐ Online Payment (Visa / MasterCard / JCB)
   
☒ 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)

← Back

Submit →

## 2.4. Credit Card payment

- Choose [Online Payment] to settle renewal fee by credit card (Visa, Mastercard or JCB)



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[Home](#) | [My Application](#) | [My Certification](#) | [My Renewal Application](#) | [My Account](#) | [Reset Password](#) | [Message](#) 9 [Sign out](#)

[Apply for CPWP upgrade](#)

# Payment

| Application No | Name            | Employer    | Expiry Date | Action  | Price   |
|----------------|-----------------|-------------|-------------|---------|---------|
| A2025000038R   | CPWPA APPLICANT | MEMBER FIRM | 2025-12-31  | Renewal | 1000.00 |

Payment Method:

☒ Online Payment (Visa / MasterCard / JCB)
   
☐ Cheque Payment/Bank Transfer

[← Back](#)
[Submit →](#)

## 2.5. Choose [Confirm Payment] under Credit Card payment

- Choose [Confirm Payment]



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

### Online Payment

Please make sure your information are correct.

|                  |                |
|------------------|----------------|
| Application ID : | A2025000038R   |
| Name :           | CPWPAAPPLICANT |
| Employer :       | MEMBER FIRM    |
| 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.





## 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 1,000.00

### 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 Click [Pay] to confirm Credit Card payment

- Review payment details before clicking [Pay]

Billing
Payment
Review
Receipt

Review your Order

**Payment Details**

**Your Order**

Card Type
Card Number
Expiration Date

Visa
xxxxxxxxxxxx4242
10-2028

Total amount

HKD 1,000.00

Back

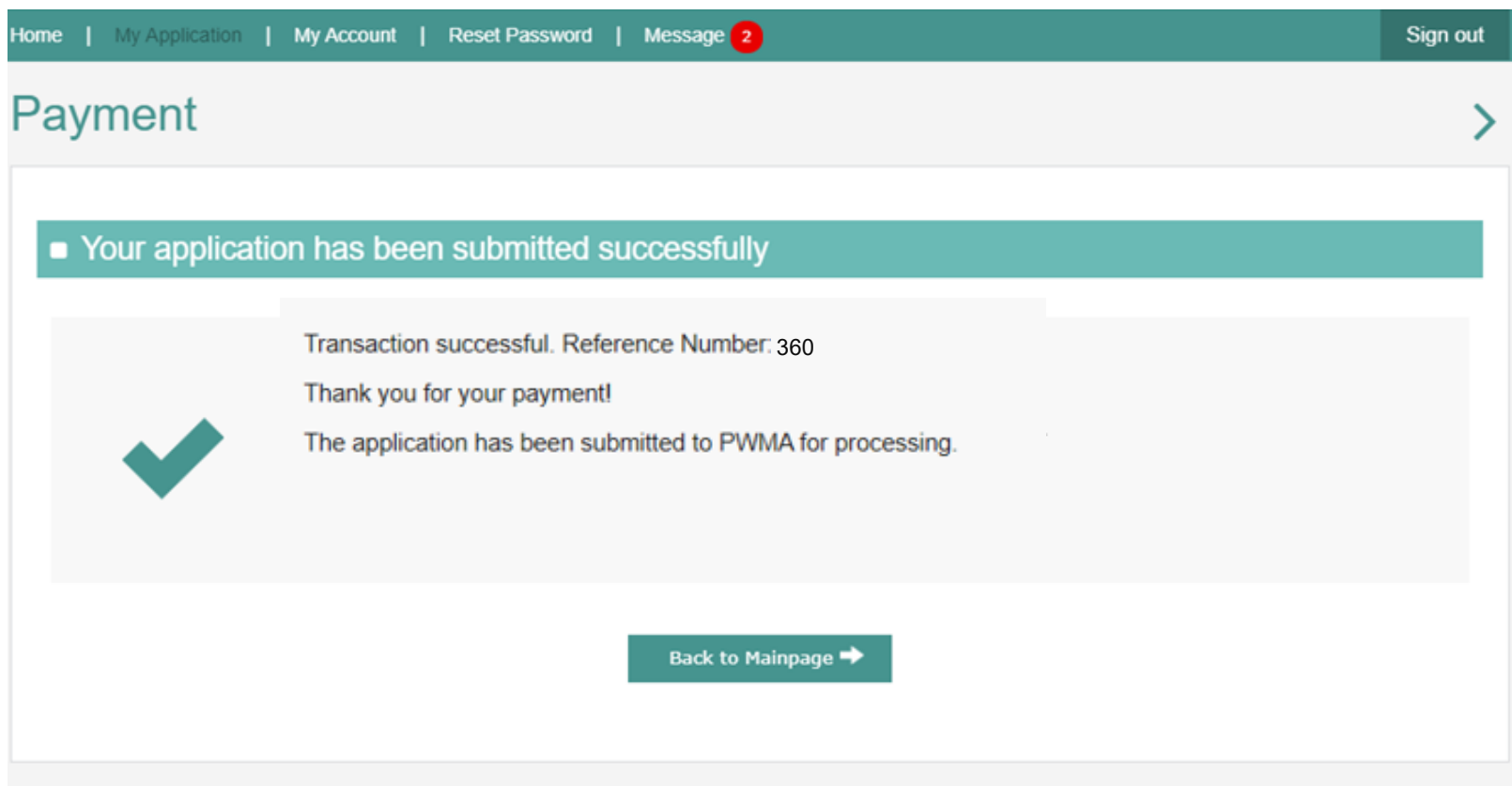
Pay

[Cancel Order](#)

## 2.8. Renewal Process – Applicant submits payment and application to PWMA

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

The applicant will receive a confirmation prompt “*Online Payment successfully*” indicating that the payment was successful.



### 3. Application Status – Renewal application submitted to PWMA

---

- Receive an email notification “**Your CPWP Associate Renewal Application(A20250000XXR) has been submitted to PWMA**” after payment

Dear APPLICANT,

Your CPWP Associate Renewal Application (Associate Renewal Application No: A20250000XXR) has been submitted to PWMA for processing.

The application fee has been paid.

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 (A20250000XXR)” 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 A20250000XXR was received from CPWP Associate Applicant at PWMA together with a non-refundable payment of HKD 1000.00.

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

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

Yours sincerely,

Private Wealth Management Association Limited

## 4. Results of CPWP Associate Certification Renewal Application

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

- “CPWPA Renewal Application(A20250000XXR) is approved. The Certification is (CPWPA No. A2025000XX)”

Dear Applicant,

CPWPA Renewal Application (A20250000XXR) is approved

With respect to your renewal application for CPWP Associate Certification (CPWP Associate Certification No. : A20240000XX) 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/](https://www.pwma-cpwponline.com/associate/certification_detail/) is hereby extended with expiry date till **31 December 2026**.

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 APPLICANT to CPWP Associate Online Platform.

Home | My Application | My Certification | My Renewal Application | My Account | Reset Password | Message **11** | Sign out

| Apply for CPWP upgrade

### My Certification >

| CPWPA No.   | Name            | Member Firm | Certification Status | Effective Till | Action                                                                                                                    |
|-------------|-----------------|-------------|----------------------|----------------|---------------------------------------------------------------------------------------------------------------------------|
| A2024000013 | CPWPA APPLICANT | MEMBER FIRM | Certified            | 2026-12-31     | <ul style="list-style-type: none"> <li>► Renewal History</li> <li>► View</li> <li>► Update Account Information</li> </ul> |

## 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

