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

PWMA
Private Wealth Management Association

CPWP Online Platform

CPWP Certification Renewal User Guide for Applicant

October 2026

Version 1.0

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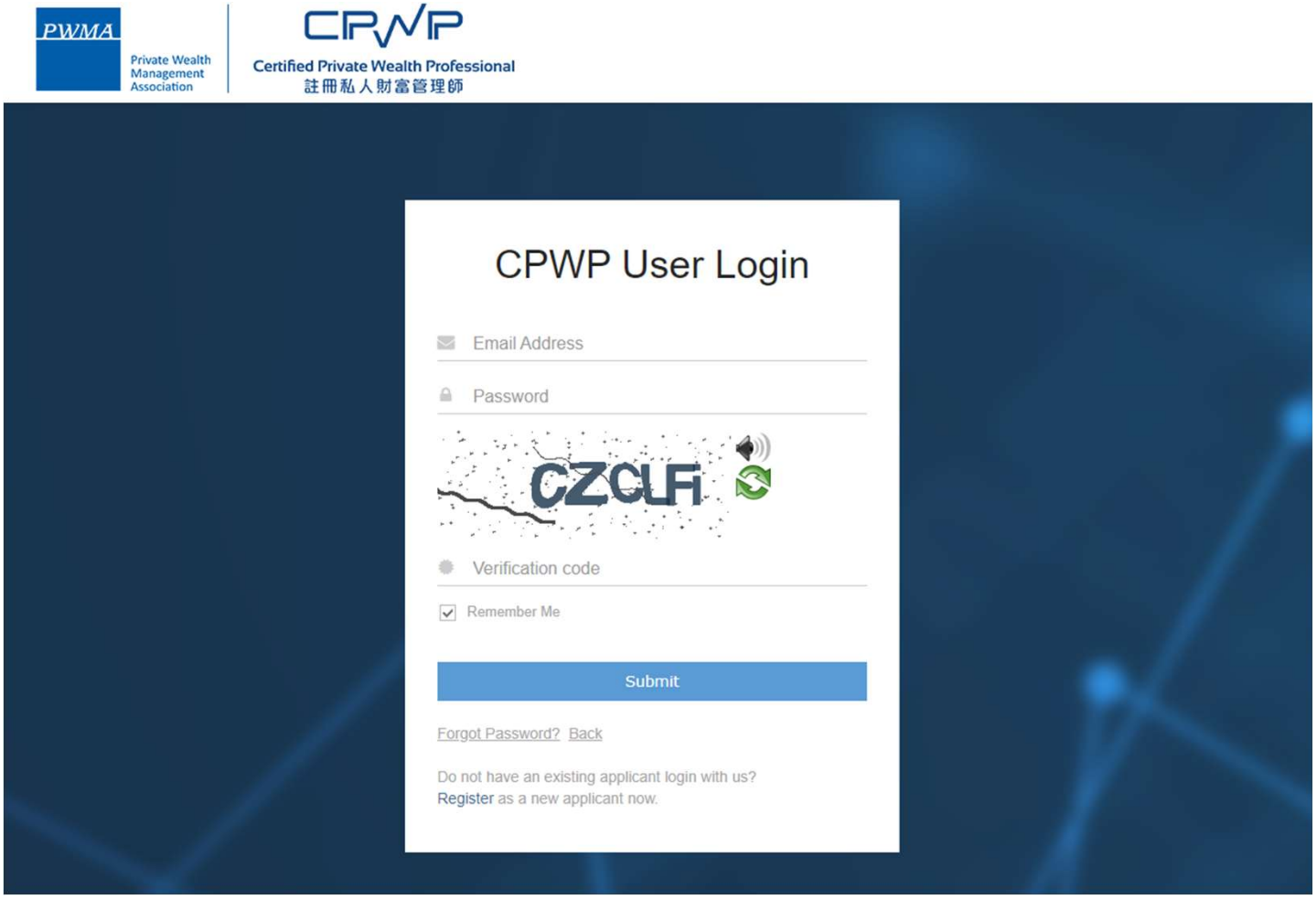
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1. CPWP Certification Renewal Process

- Login to the CPWP Online Platform by clicking **https://www.pwma-cpwponline.com/login**



1.1 Renewal Process – Applicant examines the expiry date

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



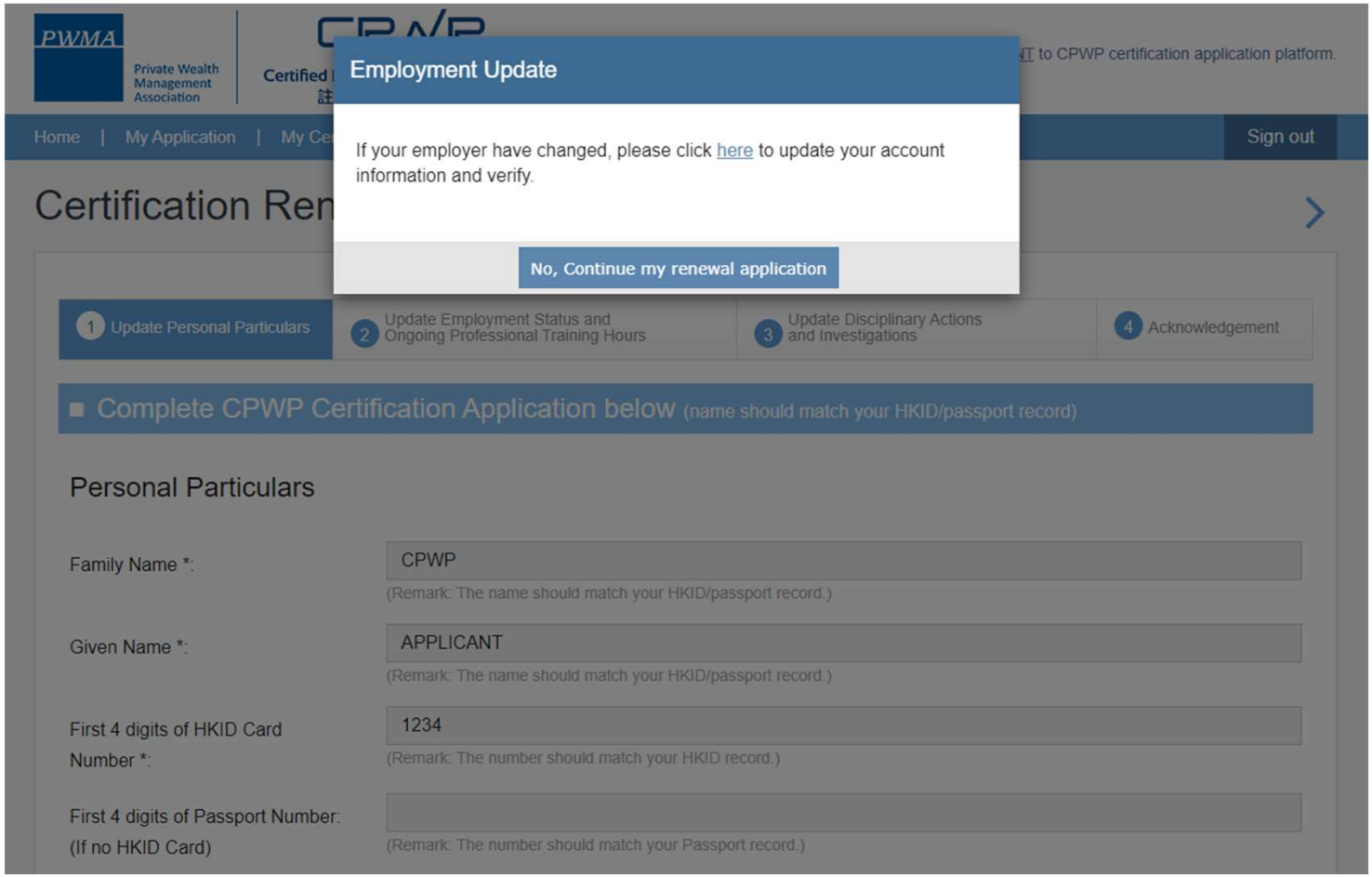
1.2. Apply for CPWP Certification Renewal

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



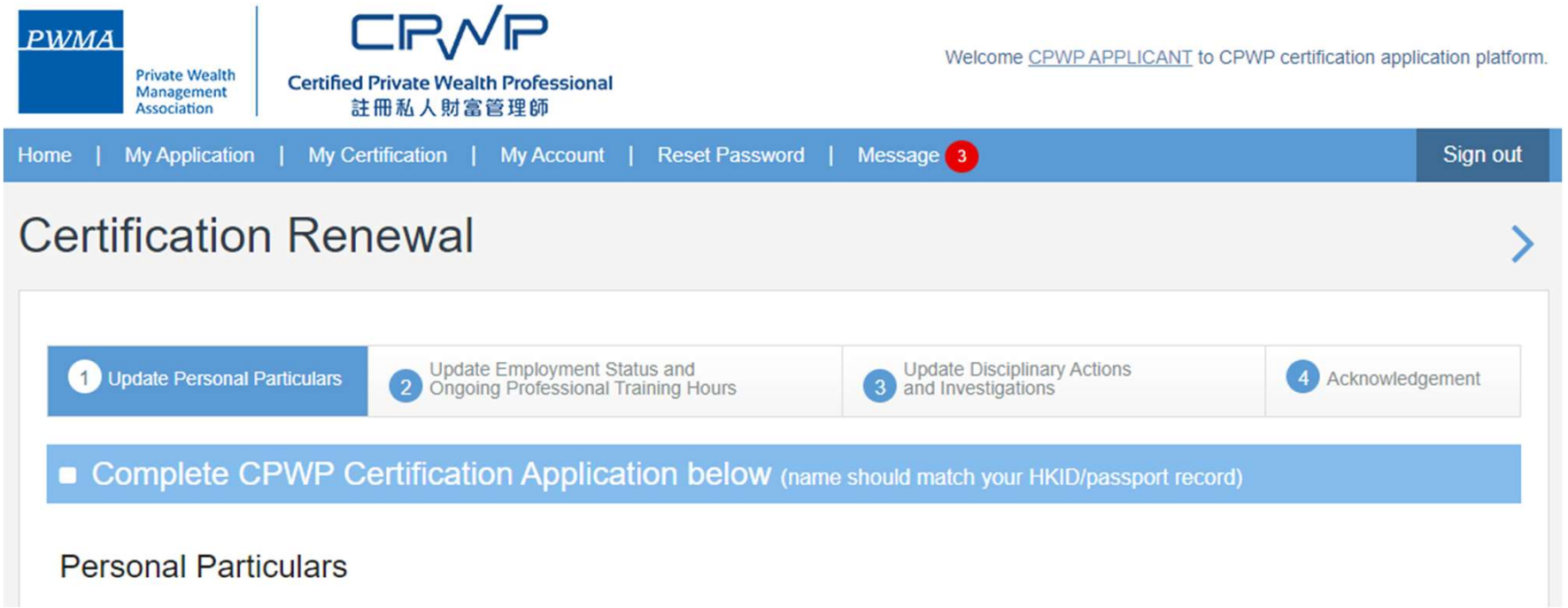
1.3. Fill-in “Employment Update”

- 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



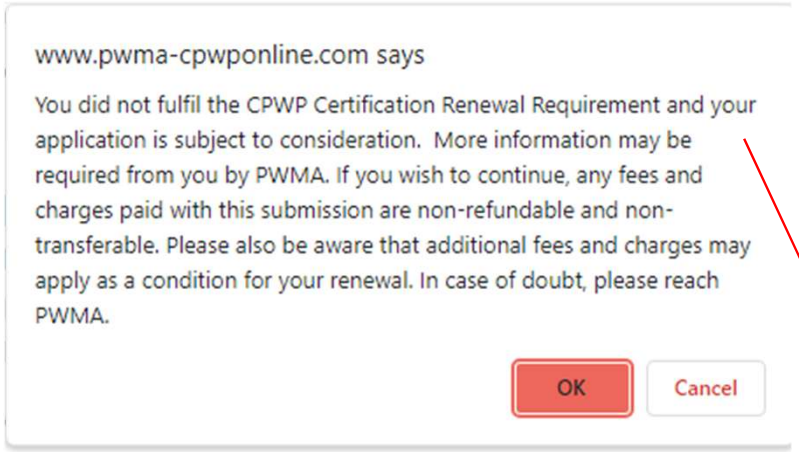
1.4. Renewal Process – Applicant updates Personal Particulars

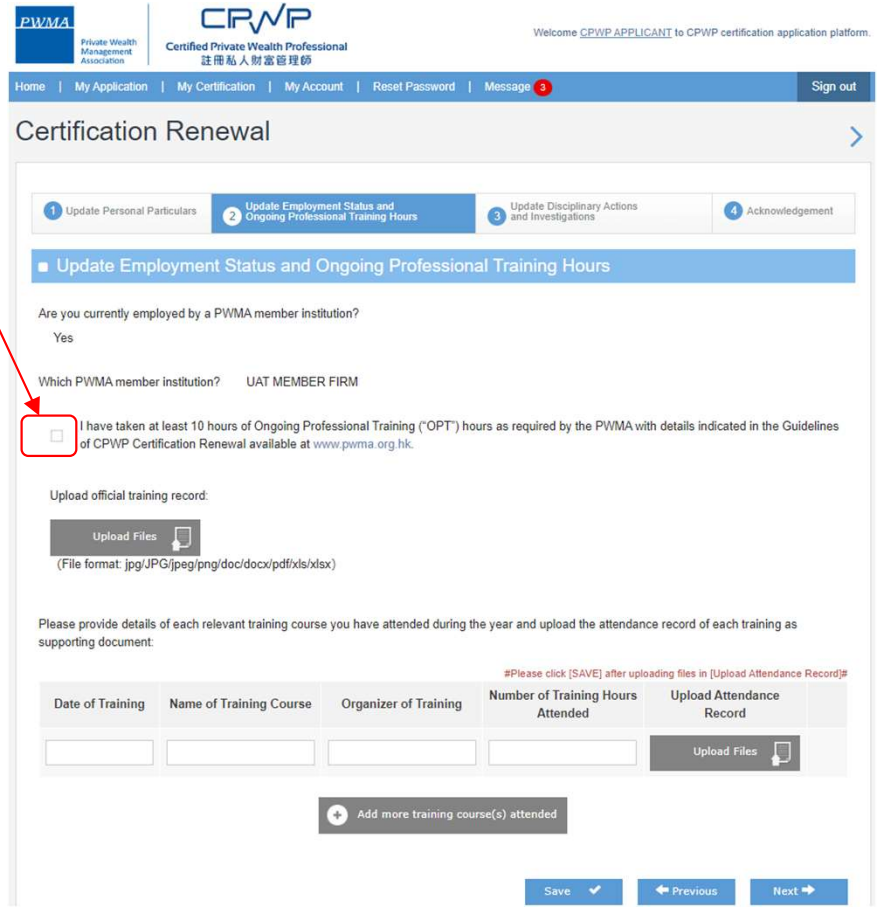
- Review [Personal Particulars] and update personal information, if necessary



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

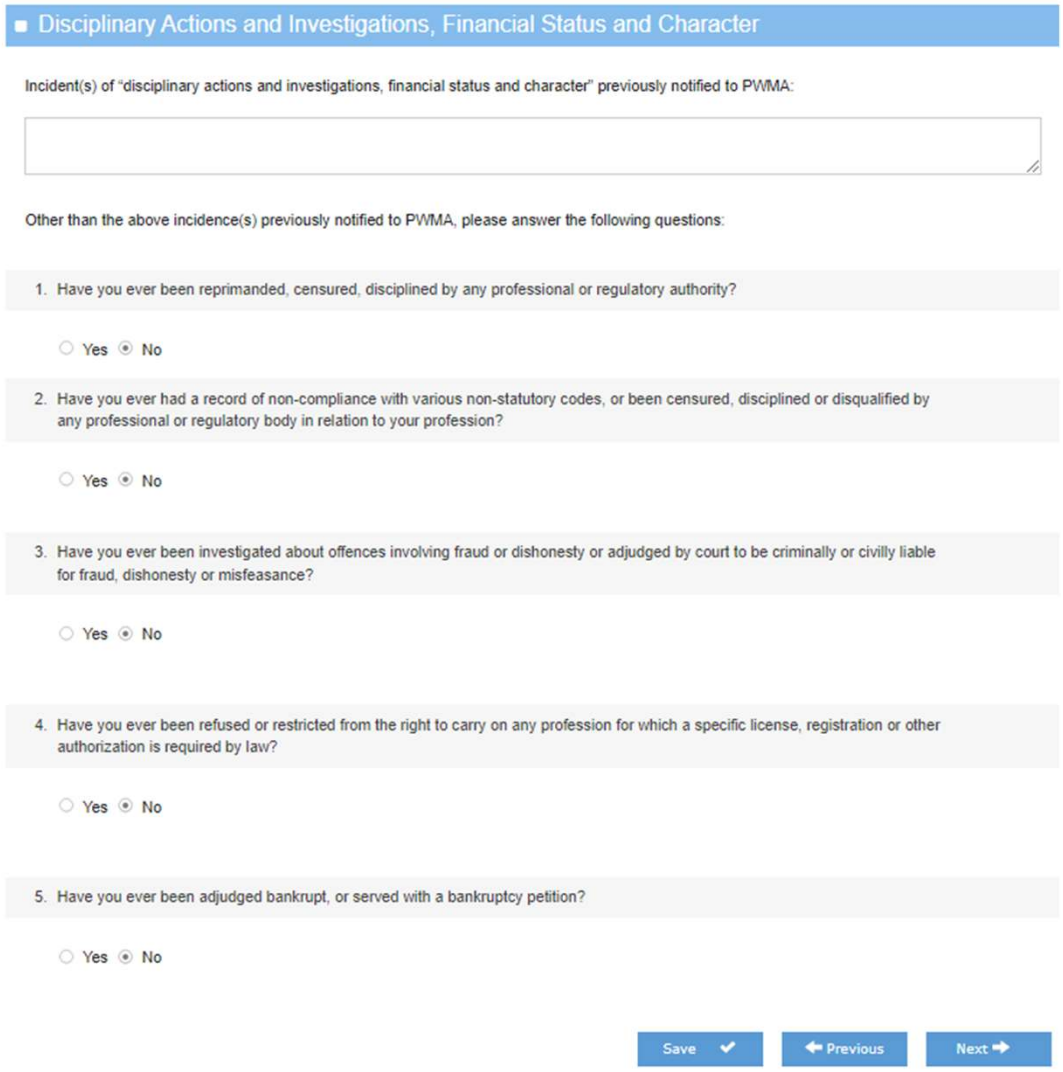
- Check the box “10 OPT hours” in the [Update Employment Status and On-going Professional Training Hours] If this box is NOT checked, a prompt will pop up to inform the Applicant about the terms and conditions
- Upload official training records if Applicant is not working at a PWMA Member Institution





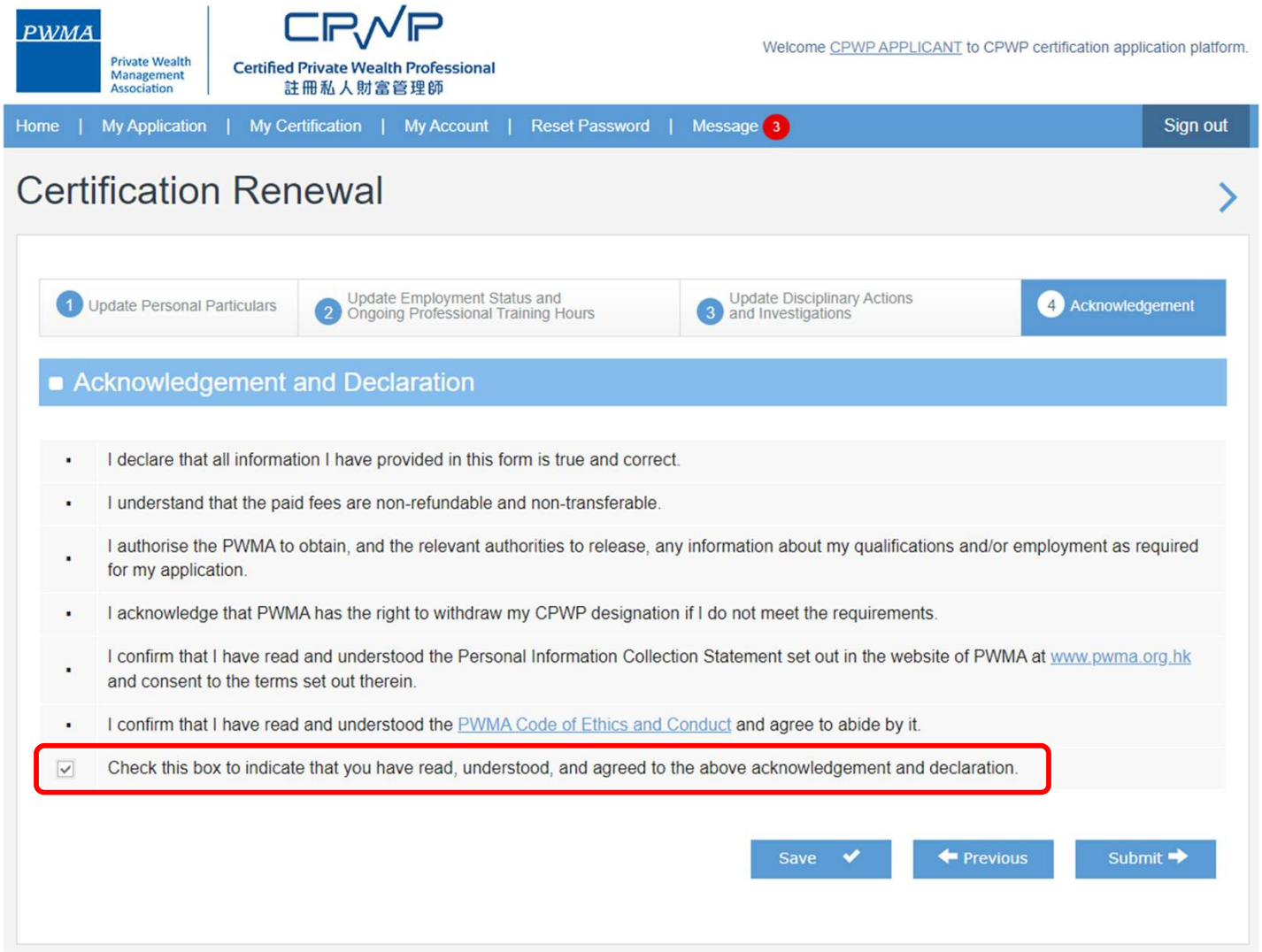
1.6. Update of [Disciplinary Actions and Investigations, Financial Status and Character]

- Review [Update Disciplinary Actions and Investigations, Financial Status and Character] and provide supporting document if any “Yes” is selected



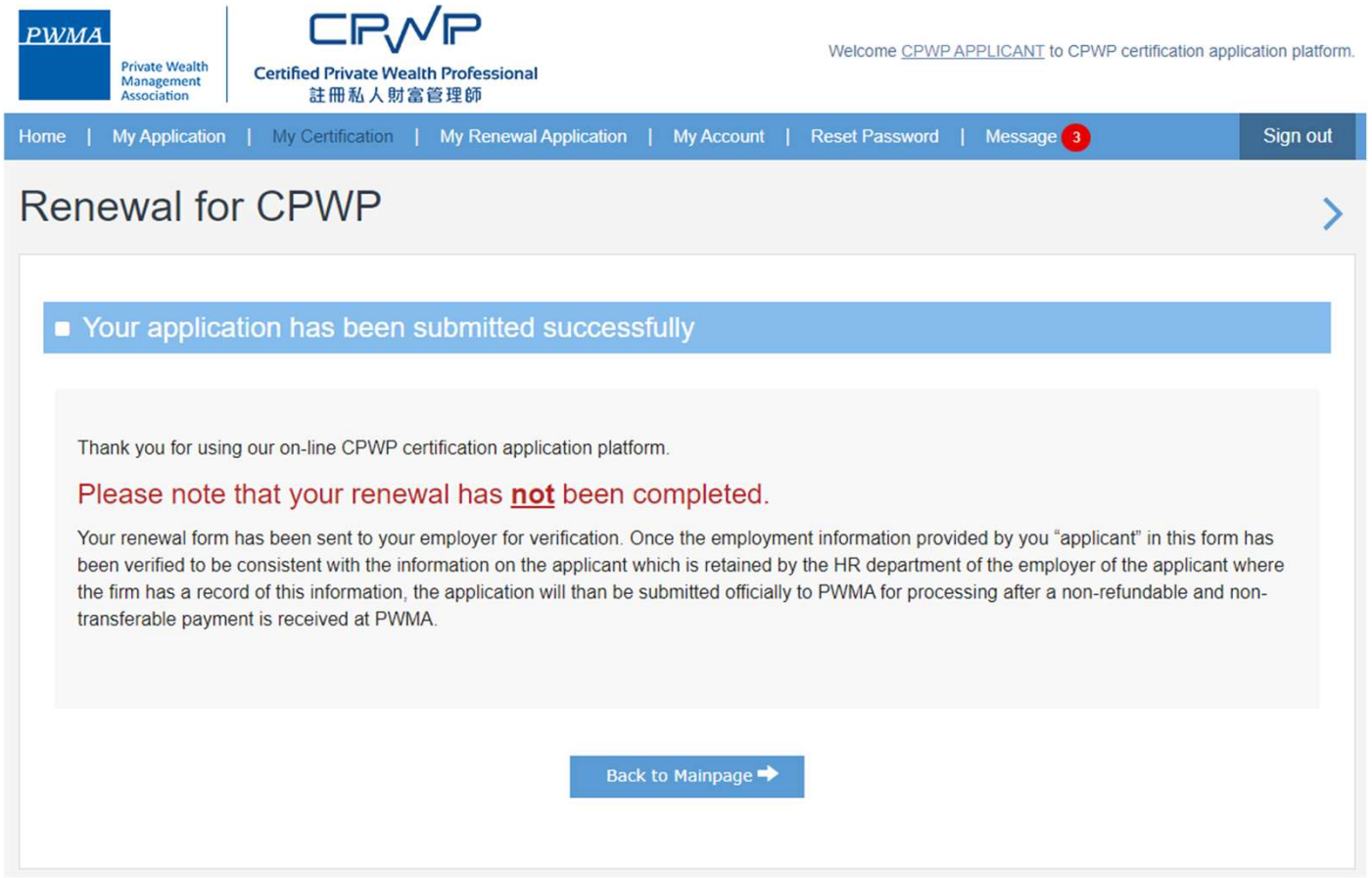
1.7. [Acknowledgement and Declaration]

- Must check the box after carefully reviewing the content of [Acknowledgement and Declaration] before clicking **[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.



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] once payment is settled by Member Institution



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 **"Renewal Application (20260000XXR) 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 online platform to settle payment
- Download an invoice to view the remittance information and request for reimbursement:

Dear Applicant

Renewal Application 20260000XXR has been verified by the relevant department of your bank, please proceed to make payment for your CPWP renewal application.

Renewal Application No：20260000XXR

Please click the below link to pay now:
https://www.pwma-cpwponline.com/

The invoice could be downloaded here:
https://www.pwma-cpwponline.com/invoice

Yours sincerely,

Private Wealth Management Association Limited

2.1 To settle CPWP Renewal Application Fee

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

- Login to **https://www.pwma-cpwponline.com/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:
    i. Credit card payment (Visa / Mastercard / JCB)
    ii. Cheque payment
    iii. Bank transfer



2.3 Cheque Payment/Bank Transfer

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

- Select **[Cheque Payment/Bank Transfer]**

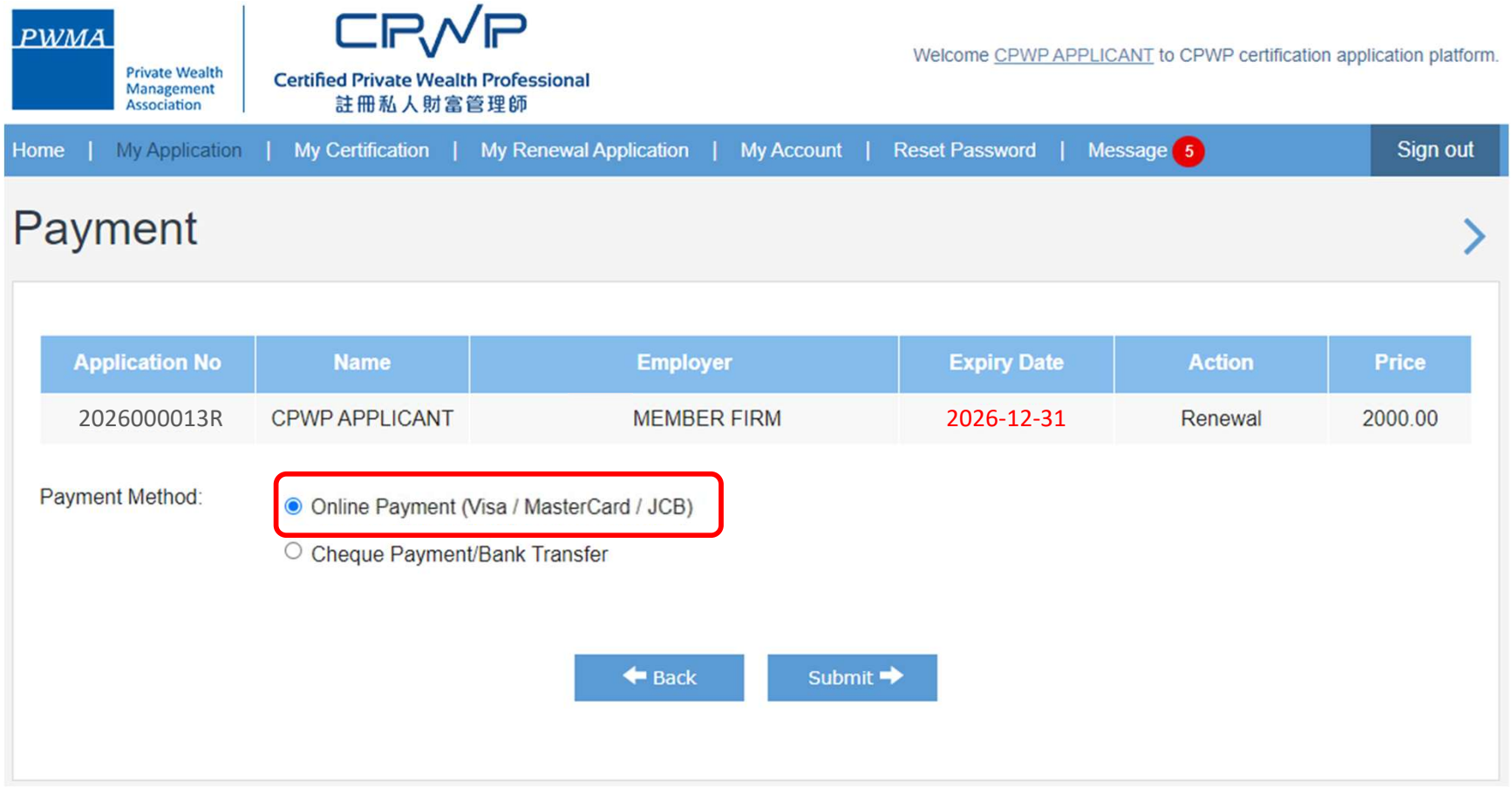
- Transfer payment via Online Banking or ATM machine, please be reminded to retain the receipt; or
- Write a cheque payable to “Private Wealth Management Association Limited” and scan a cheque copy before mail it to PWMA office

- Upload Cheque copy/Bank Transfer receipt before clicking **[Submit]**



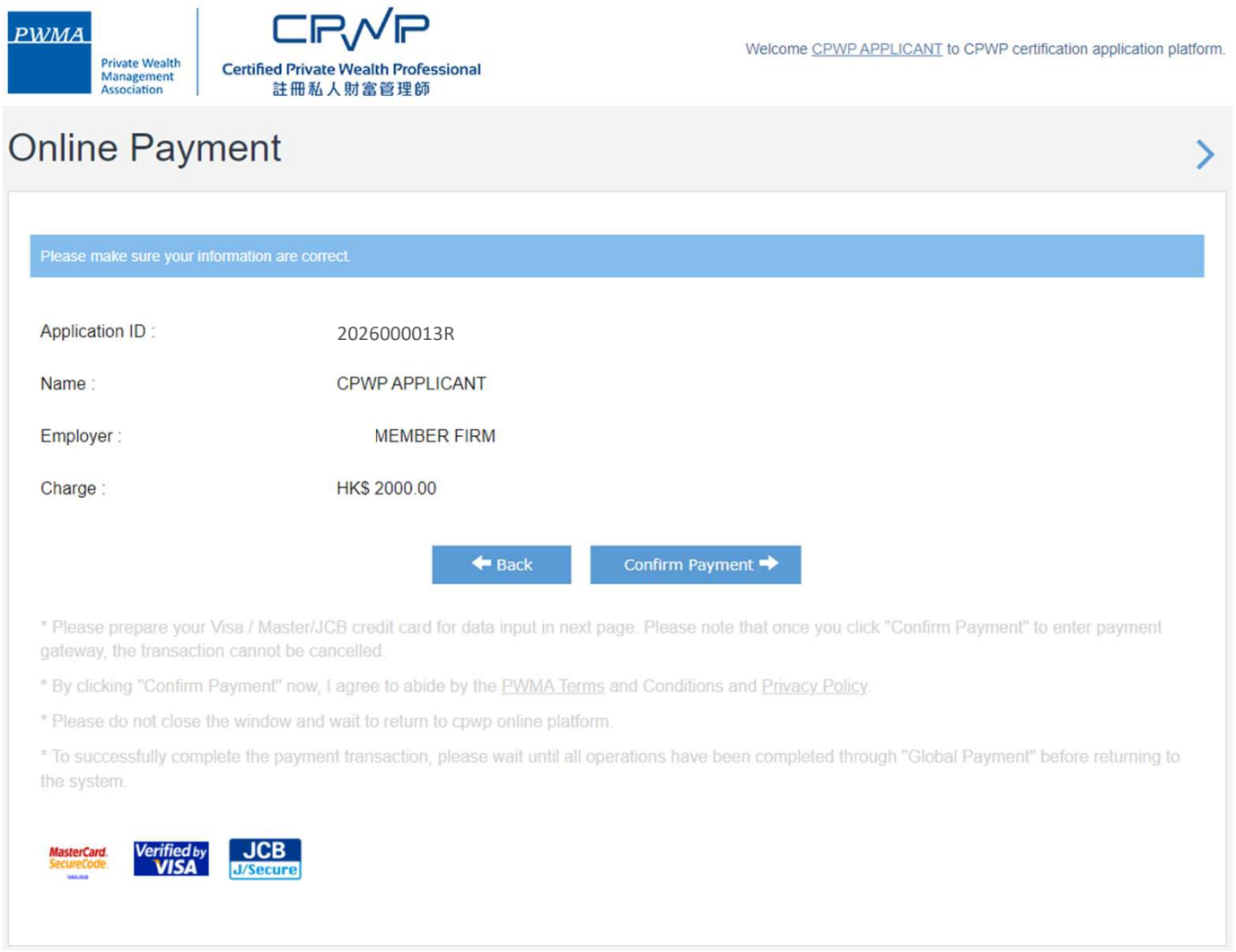
2.4. Credit Card payment

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



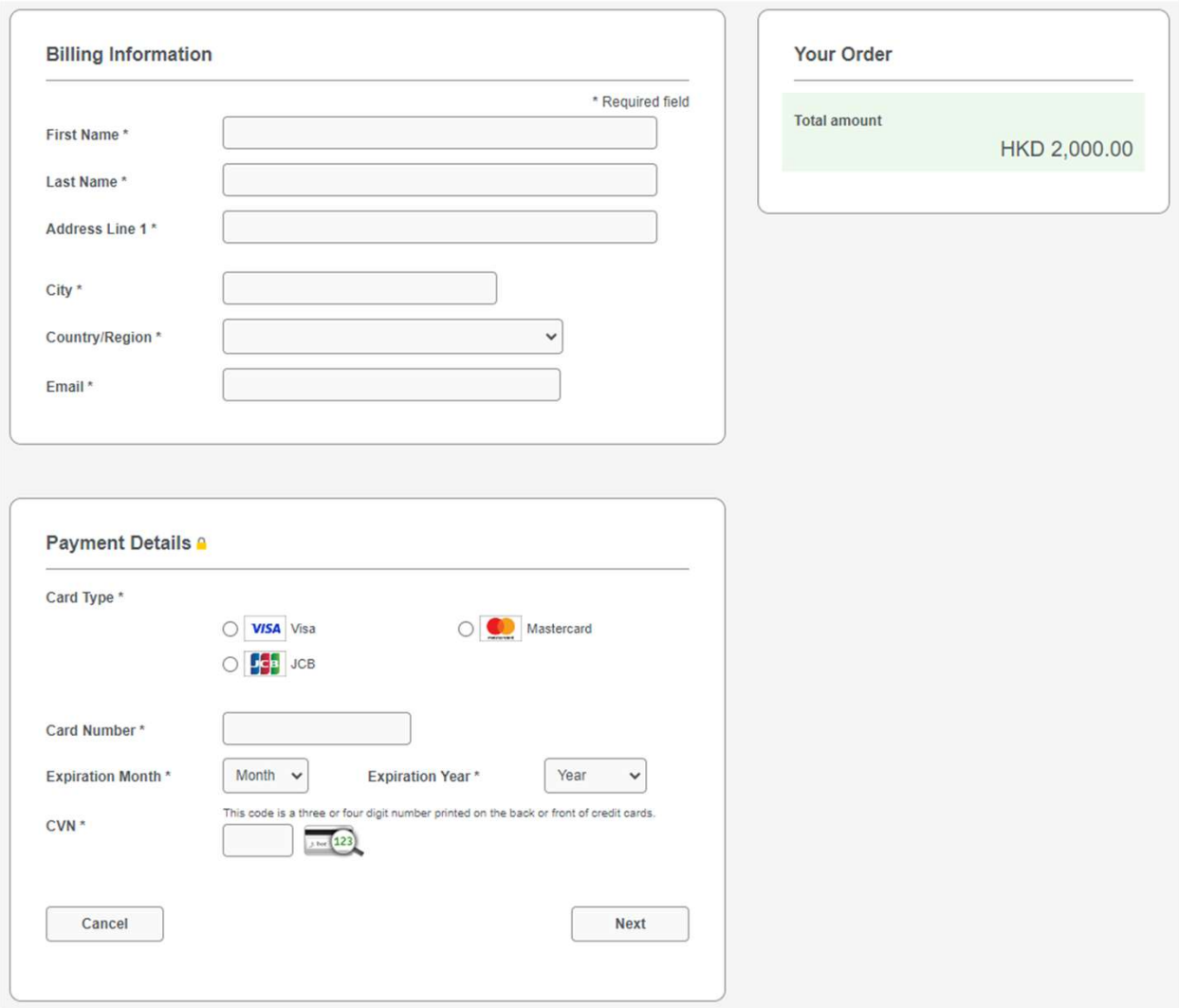
2.5. Choose [Confirm Payment] under Credit Card payment

- Choose [Confirm Payment]



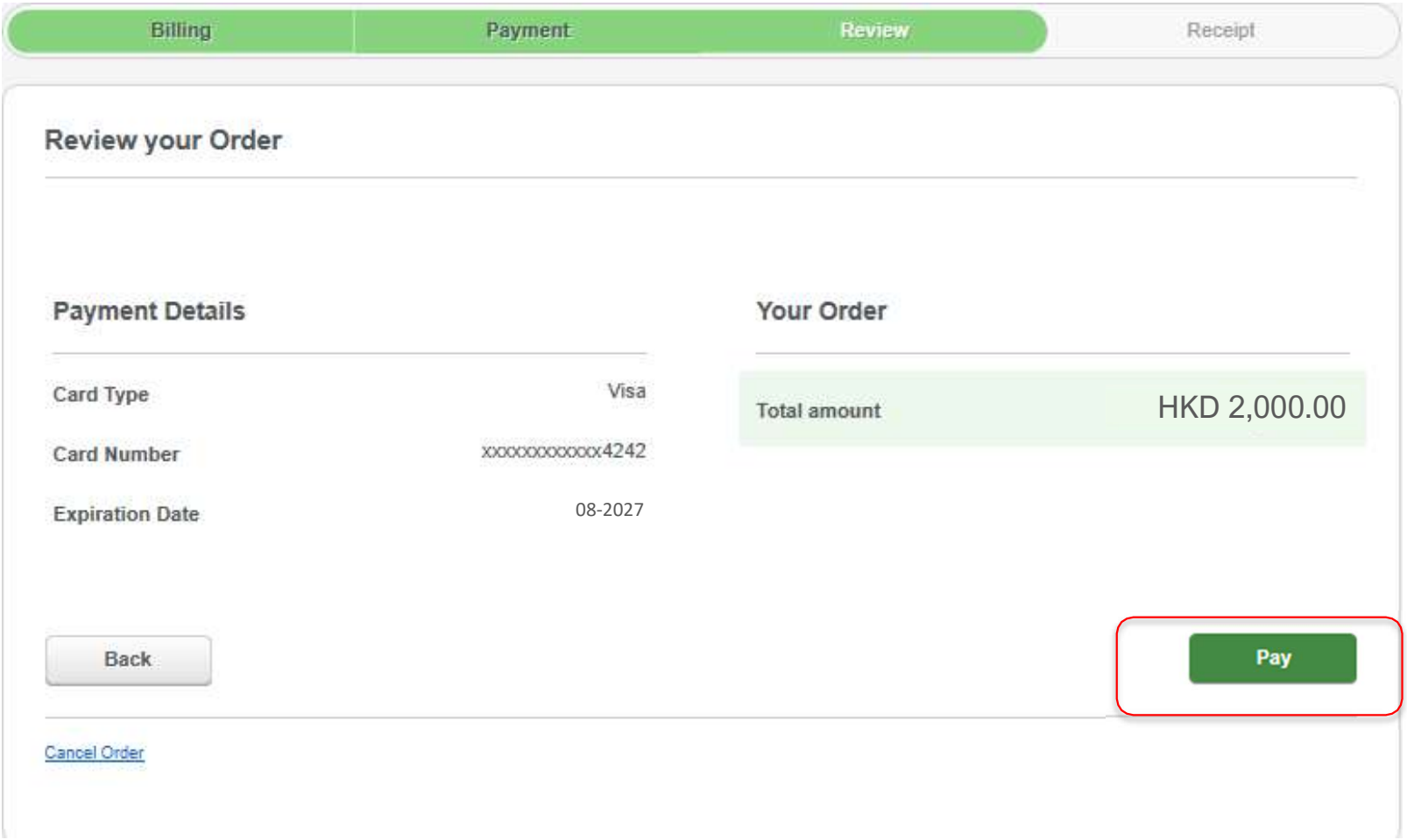
2.6. Fill-in Billing info and Payment Details to proceed Credit Card payment

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



2.7 Click [Pay] to confirm Credit Card payment

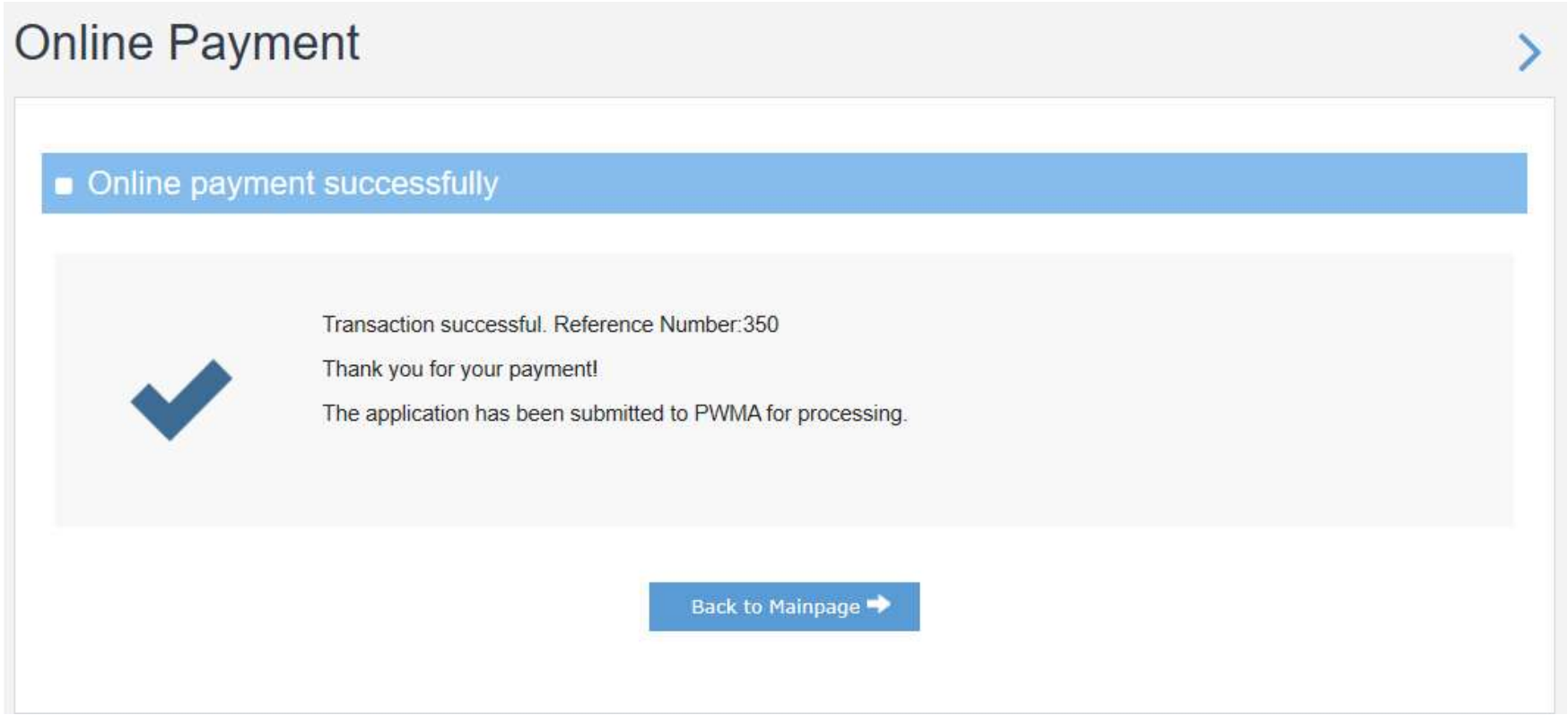
- Review payment details before clicking [Pay]



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 Renewal Application(20260000XXR) has been submitted to PWMA**" after payment

Dear APPLICANT

Your CPWP Renewal Application (Renewal Application No: 20260000XXR) 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 Renewal Application (20260000XXR)” after the payment is confirmed by PWMA
- Login to CPWP online platform to download a receipt for reimbursement

Dear Applicant

Thank you for your payment.

This is to confirm that a CPWP Certification Renewal Application 20260000XXR was received from CPWP Applicant at PWMA together with a non-refundable payment of HKD 2000.00.

For the purposes of your reimbursement, please download the receipt from below link:
https://www.pwma-cpwponline.com/receipt/

Yours sincerely,

Private Wealth Management Association Limited

4. Results of CPWP Certification Renewal Application

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

- "CPWP Renewal Application (20260000XXR) is approved. The Certification is (CPWP No. 2025000XX)"

Dear Applicant

CPWP Renewal Application (Renewal Application Number) is approved

With respect to your renewal application for CPWP certification (CPWP Certification No.: 20250000XX) for the purpose of the Enhanced Competency Framework, we are pleased to confirm that you have fulfilled the requirements for certification renewal. Your CPWP certification https://www.pwma-cpwponline.com/certificate/ is hereby extended with expiry date till **31 December 2027**.

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 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 CPWP 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/login
- Choose **[My Certification]** to view the [Certification Status] and [Effective Till] Date



4.2 Download CPWP Electronic Certificate

Online CPWP Electronic Certificate is available

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

