

CPWPA Online Platform

CPWP Associate Certification Application User Guide for University Student Applicant

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1. New Application Process

Registration

- “Register” as new applicant via CPWP Associate Online Platform (www.pwma-cpwponline.com)



Welcome to CPWP and CPWP Associate Online Platform

CPWP Online Platform ▶

CPWP Associate Online Platform ▶

2. New Application Process

Registration (Cont'd)

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



PWMA Private Wealth Management Association

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

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.

3. New Application Process

Requirements for CPWPA certification

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

The screenshot shows a web application interface for the Private Wealth Management Association (PWMA). The top left corner features the PWMA logo and the text "Private Wealth Management Association". A "Certified" badge is visible on the left side. The main content area is titled "Requirements for CPWP Associate certification:". Below the title, the text reads: "The below condition must be met before applying for CPWP Associate certification:". A bulleted list follows: "• 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." Below the list, a paragraph states: "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." At the bottom of the modal, there is a checkbox labeled "I have read and understood the above requirements." and a prompt: "Please click [Confirm] to continue." Two buttons, "Confirm" and "No", are positioned at the bottom of the modal. Below the modal, a form field is visible with the label "Please input ..." and a dropdown menu showing "University Students (Full-Time)".

4. New Application Process

Registration (Cont'd)

- Choose the third option and selects a University from the pulldown list, or input your University's name in 'Others'

The screenshot shows the registration process for a new applicant. The form is titled "Register as New Applicant" and asks the user to select their employment status. The options are:

- Employed by PWMA Member Firm
- Employed by Non-PWMA Member Firm/ Others
Please input ...
- University Students (Full-Time)

The dropdown menu for "University Students (Full-Time)" is open, showing a list of universities:

- University Students (Full-Time)
- City University of Hong Kong
- Hong Kong Baptist University
- Hong Kong Metropolitan University
- Hong Kong Shue Yan University
- Lingnan University
- The Chinese University of Hong Kong
- The Education University of Hong Kong
- The Hang Seng University of Hong Kong
- The Hong Kong Polytechnic University
- The Hong Kong University of Science and Technology
- The University of Hong Kong
- Others

5. New Application Process

Registration (Cont'd)

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

The screenshot displays a registration form titled "Register as New Applicant" with a right-pointing arrow. At the top, there are logos for PWMA (Private Wealth Management Association) and CRWPA (Certified Private Wealth Professional Associate / 註冊私人財富管理師). Below the logos, a progress bar shows three steps: 1. Personal Particulars (highlighted in green), 2. Identity Information, and 3. Education Information. The "Personal Particulars" section is expanded, showing 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.
- University Email Address *: Text input field.
- Personal Email *: Text input field.
- Contact No. *: Two text input fields labeled "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.

6. New Application Process

Registration (Cont'd)

- Fill in [Identity Information]

The screenshot displays the 'Register as New Applicant' web form. At the top left, 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 Education 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 of the form, there are two buttons: '← Previous' and 'Next →'.

7. New Application Process

Registration (Cont'd)

- Input your **Faculty** and **Year of Study** under **[Education Information]** and check all boxes to confirm the declaration statements before clicking “Submit”

The screenshot displays the registration process for a new applicant. At the top, the PWMA logo and the CRWPA logo (Certified Private Wealth Professional Associate) are visible. The main heading is "Register as New Applicant". Below this, there are three steps: 1. Personal Particulars, 2. Identity Information, and 3. Education Information. The "Education Information" step is currently active. The form fields include: University Name (Lingnan University), Faculty * (empty), and Year of Study (Please select a value between 1 to 4). Below the form fields, there are three checkboxes for declaration statements. At the bottom right, there are "Previous" and "Submit" buttons.

PWMA Private Wealth Management Association

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

Register as New Applicant

1 Personal Particulars 2 Identity Information 3 Education Information

Education Information

University Name: Lingnan University

Faculty *:

Year of Study: Please select a value between 1 to 4.

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 university and my future PWMA-member-firm employer.

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

← Previous Submit →

8. New Application Process

Registration (Cont'd)

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

The screenshot shows the registration confirmation page for PWMA. At the top left, there are logos for PWMA (Private Wealth Management Association) and CPWPA (Certified Private Wealth Professional Associate / 註冊私人財富管理師). The main heading is "Register as New Applicant" with a right-pointing arrow. Below this, a teal banner displays the message "Your account has been created successfully". Underneath, a large teal checkmark is followed by 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 teal button labeled "Back to Mainpage" with a right-pointing arrow.

9. New Application Registration

Registration (Cont'd)

- Applicant receives an email of “Welcome to Certified Private Wealth Professional (CPWP) Associate Account Registration

Dear Applicant,

Thank you for registering to the CPWP Associate Online Application Platform.

Your account has been created successfully.

You can now login to your account to access the online application form via <https://www.pwma-cpwponline.com> with the following username and password:

Username : Applicant@XXXXXX.COM

Password : 1wF#X1i\$

Yours sincerely,

Private Wealth Management Association Limited

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

10. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

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



11. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Select [CPWP Associate User Login]



12. 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.

13. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Please change the random initial password upon first time login

The screenshot displays the PWMA CPWPA portal 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 top right, the user is identified as 'Hi CPWPA STUDENT_10' with a 'Message' link and a 'Sign out' button.

The main content area features a 'Reset Password' form with the following fields:

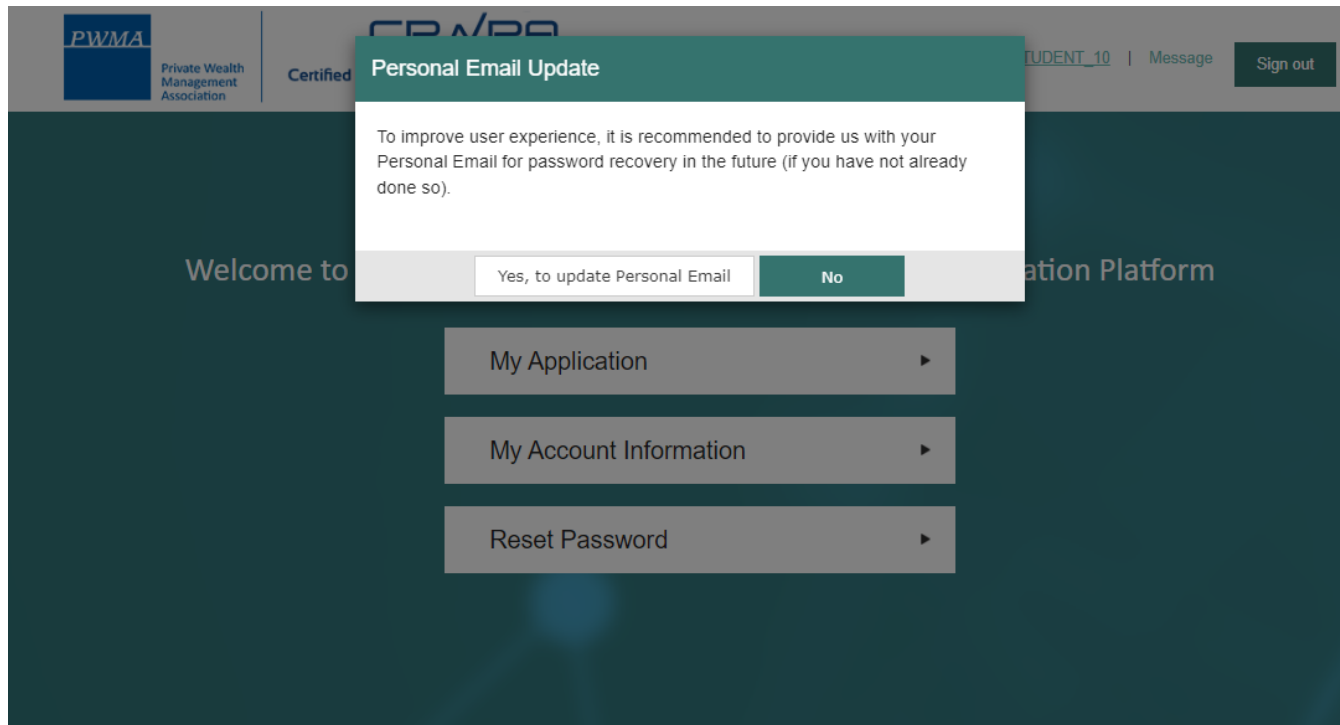
- Your Current Password:
- New Password:
- Confirm Password:

Below the form are two buttons: '← Back' and 'Submit →'. A red message at the bottom of the form reads: 'First login, please change the initial password'.

14. 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, update personal email address by clicking [Yes, to update Personal Email]



15. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

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

The screenshot shows the user interface of the CPWP Associate Certification and Renewal Application Platform. At the top left, there is 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). On the top right, the user is identified as 'Hi CPWPA STUDENT_10 | Message' with a 'Sign out' button. The main content area is a teal background with the text 'Welcome to CPWP Associate Certification and Renewal Application Platform'. Below this, there is a list of navigation options: 'My Application', 'My Account Information', and 'Reset Password'. The 'My Application' option is highlighted with a red rectangular border.

16. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Click [Apply for CPWP Associate] button

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 STUDENT_10 to CPWP Associate Online Platform." Below the logos is a navigation bar with links: Home | My Application | My Account | Reset Password | Message. A "Sign out" button is located on the far right of the navigation bar. The main content area is titled "My Application" with a right-pointing arrow. Below this title is a table with the following columns: Application No, Applicant Name, Date of Submission to PWMA, Application Status, and Action. The table currently contains no records, indicated by the text "No records" in red. Below the table, a button labeled "Apply for CPWP Associate" is highlighted with a red rectangular 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

17. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Fill-in all required information from section 1 to 5 before clicking **[submit]**
- Applicant must upload CPWP Module 1 and Module 2 official examination results in Question 2

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 / 註冊私人財富副管理師). A welcome message reads: 'Welcome CPWPA STUDENT_10 to CPWP Associate Online Platform.' The navigation bar includes links for Home, My Application, My Renewal Application, My Account, Reset Password, Message (with a red notification bubble containing the number 10), and Sign out.

The main heading is 'Apply for CPWP Associate' with a right-pointing arrow. Below this is a progress bar with five steps: 1. Qualifications, 2. Personal Particulars, 3. Education Details, 4. Disciplinary Actions and Investigations, and 5. Acknowledgement. Step 1 is currently active.

A teal banner below the progress bar says 'Please answer the following questions'. The first question is: '1. Which university are you attending?'. The answer provided is 'Lingnan University'.

The second question is: '2. Have you passed and do you have valid results from within the last five years for one of the following combinations:'. There are two radio button options:

- 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

At the bottom right, there are two buttons: 'Save' with a checkmark icon and 'Next' with a right-pointing arrow icon.

18. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Or click [Save] button to complete the application later

The screenshot shows the 'Apply for CPWP Associate' page on the CPWPA Online Platform. The page header includes the PWMA logo, the CPWPA logo (Certified Private Wealth Professional Associate), and a welcome message for 'CPWPA STUDENT_10'. The navigation bar contains links for Home, My Application, My Renewal Application, My Account, Reset Password, Message (10), and Sign out.

The main content area is titled 'Apply for CPWP Associate' and features a progress bar with five steps: 1. Qualifications, 2. Personal Particulars, 3. Education Details, 4. Disciplinary Actions and Investigations, and 5. Acknowledgement. The current step is 'Qualifications', which contains the following questions:

- Which university are you attending?
Lingnan University
- 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

Below the questions is an 'Upload Files' section with a file format restriction: (File format: jpg/JPG/jpeg/png/doc/docx/pdf/xls/xlsx). A file named 'Dummy_1688051545.docx' is listed as uploaded on 2023-06-26. At the bottom right, there are 'Save' and 'Next' buttons.

19. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

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

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

Apply for CPWP Associate

Welcome [CPWPA STUDENT 10](#) to CPWP Associate Online Platform.

1 Qualifications 2 Personal Particulars **3 Education Details** 4 Disciplinary Actions and Investigations 5 Acknowledgement

■ Education Details:

Current Experience

University	Faculty	Year of Study	Study Period MM/DD/YY	Number of Years and Months in Study
Lingnan University	Business	3	<input type="text"/> - <input type="text"/>	

Save ✓ ← Previous Next →

20. 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 application interface for CPWP Associate. 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." The 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 it is a progress bar with five steps: 1. Qualifications, 2. Personal Particulars, 3. Education Details, 4. Disciplinary Actions and Investigations (currently active), and 5. Acknowledgement.

The active section is 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 radio button options for Yes and No:

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 icon, "Previous" with a left arrow icon, and "Next" with a right arrow icon.

21. 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. The header includes the PWMA logo, the CPWPA logo (Certified Private Wealth Professional Associate / 註冊私人財富管理師), and a welcome message for 'CPWPA STUDENT_10'. A 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. Education Details, 4. Disciplinary Actions and Investigations, and 5. Acknowledgement. The fifth step is currently active.

Under the 'Acknowledgement and Declaration (Applicant)' section, there is a list of seven statements for the applicant to agree to:

- 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 university.

At the bottom of this section, there is a checkbox with the text: 'Check this box to indicate that you have read, understood, and agreed to the above acknowledgement and declaration.' This checkbox is highlighted with a red border in the original image.

At the bottom right of the form, there are three buttons: 'Save' (with a dropdown arrow), 'Previous' (with a left arrow), and 'Submit' (with a right arrow).

22. New Applicant [Apply for CPWP Associate] procedures

Apply for CPWP Associate procedures

- Receive 'Your application has been submitted successfully' prompt, applicant clicks [Go to Pay Now] to settle the payment now

The screenshot displays the CPWP Associate Online Platform interface. At the top left, the PWMA logo is visible. In the center, the CPWP logo is shown with the text 'Certified Private Wealth Professional Associate' and '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 header is a navigation bar with links for 'Home', 'My Application', 'My Account', 'Reset Password', 'Message' (with a red notification icon), and 'Sign out'. The main content area features a large heading 'Apply for CPWP Associate' with a right-pointing arrow. A prominent teal banner 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, there are two teal buttons: 'Go to Pay Now' with a right-pointing arrow and 'Back to Mainpage' with a right-pointing arrow.

23. 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 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, a welcome message reads "Welcome CPWPA STUDENT_10 to CPWP Associate Online Platform." Below the logos 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 with the following data:

Application No	Applicant Name	Date of Submission to PWMA	Application Status	Originated	Action
A2023000076N	CPWPA STUDENT_10		Pending Payment by Applicant		View Go to Pay

Below the table is a "Comment(s)" section with the following entry:

2023-06-29 11:49:51 Please make the payment for your CPWP Associate Application(A2023000076N)

24. New Applicant – Applicant settles the application fee

Settle Payment by Credit Card or Bank Transfer or Cheque

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

Dear Applicant,

Please proceed to make payment for your CPWP Associate application.

CPWP Associate Application No : A20230000XXN

Please click the below link to pay now:

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

The invoice could be download here:

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

Yours sincerely,

Private Wealth Management Association Limited

25. New Applicant settles Payment

If Payment is settled by Applicant's Credit Card

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



The screenshot shows the 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_STUDENT_10 to CPWP Associate Online Platform." The navigation bar includes links for Home, My Application, My Account, Reset Password, and Message (with a notification badge '1'), and a Sign out button. 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
A2023000076N	CPWPA STUDENT_10		Pending Payment by Applicant		View Go to Pay

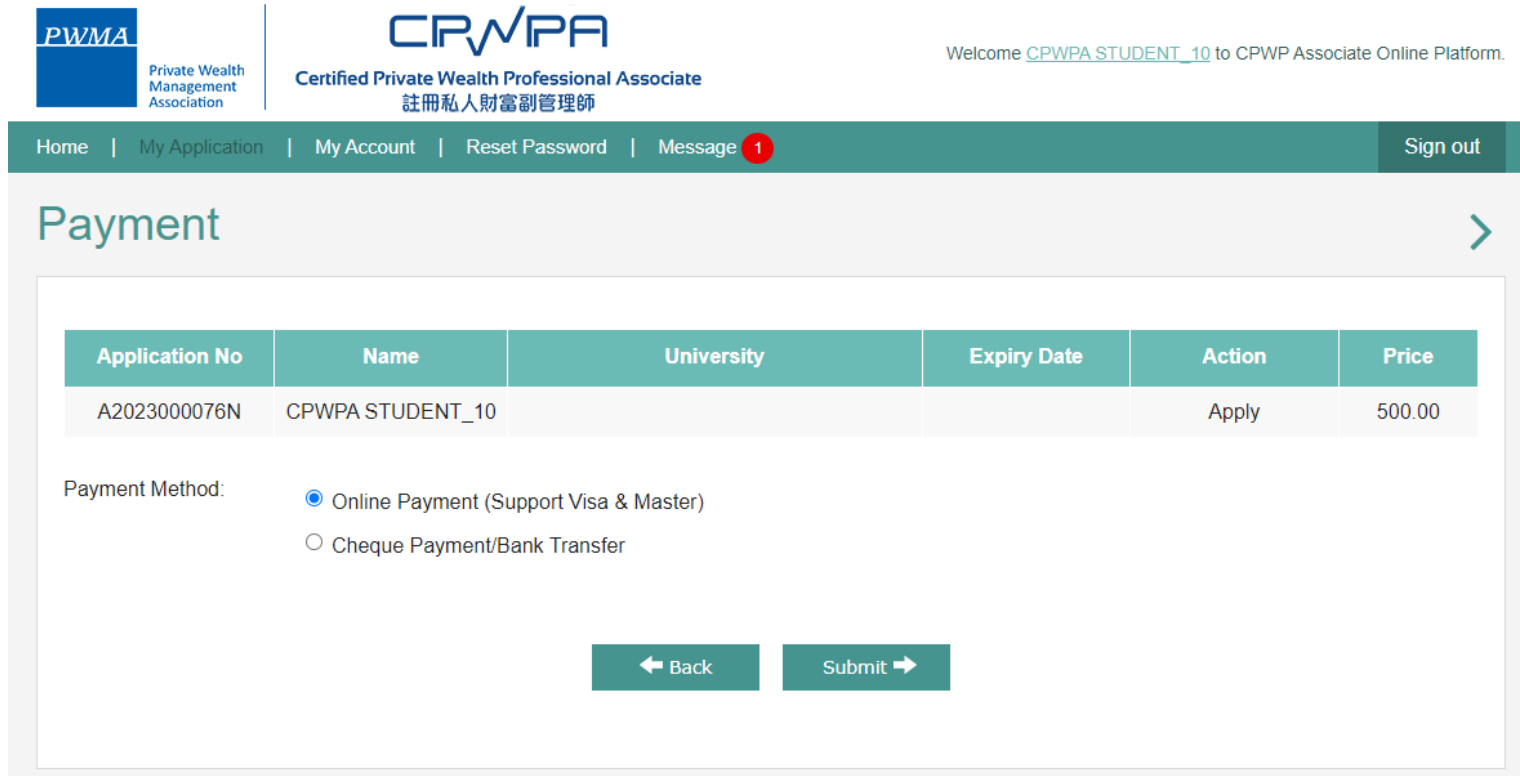
Below the table, there is a "Comment(s)" section with the following entry:



2023-06-29 11:49:51 Please make the payment for your CPWP Associate Application(A2023000076N)

26. New Applicant settles Payment

If Payment is settled by Applicant's Credit Card

- Select [Online Payment] if applicant chooses to pay by Credit Card





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

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

Payment >

Application No	Name	University	Expiry Date	Action	Price
A2023000076N	CPWPA STUDENT_10			Apply	500.00

Payment Method:


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

← Back
Submit →


27. New Applicant settles Payment

If Payment is settled by Applicant's Credit Card

- Fill out Credit Card information before submitting the application to PWMA



Private Wealth Management Association



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

Welcome CPWPA STUDENT_10 to CPWP Associate Online Platform.




Online Payment >

Please make sure your information are correct.

Application ID :	A2023000076N
Name :	CPWPA STUDENT_10
Employer :	
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.

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 500.00

28. New Applicant settles Payment

If Payment is settled by Cheque or Bank Transfer

- Select Cheque Payment/Bank Transfer and click [Upload Files] to **upload Cheque copy or Bank receipt before clicking [Submit]**

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.

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

Payment


Application No	Name	University	Expiry Date	Action	Price
A2023000076N	CPWPA STUDENT_10			Apply	500.00

Payment Method:

Online Payment (Support Visa & Master)

Cheque Payment/Bank Transfer

Attach Cheque Payment/Bank Transfer Receipt or Payment Proof

Upload Files 

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

Back Submit

29. New Applicant settles Payment

If Payment is settled by Cheque Payment or Bank Transfer

- Click [Yes] to submit CPWPA online application

The screenshot displays the CPWPA online application platform interface. A modal dialog box is centered on the screen, titled "Payment and submission processing". The dialog asks "Are you sure to continue?" and provides two buttons: "Yes" and "No".

The background interface shows the following details:


- Header:** PWMA Private Wealth Management Association logo, "Certified" badge, and "CPWPA" logo.
- Navigation:** Home | My Application | My Account | Sign out
- Page Title:** Payment
- Table:**

Application No	Name	University	Expiry Date	Action	Price
A2023000076N	CPWPA STUDENT_10			Apply	500.00

Payment Method:

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

Attach Cheque Payment/Bank Transfer Receipt or Payment Proof

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

- [Dummy_1688011339.docx](#) (Uploaded date: 2023-06-29) ✕

Navigation buttons: Back, Submit

30. 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 STUDENT_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 banner with the message: "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 the main content area is a teal button labeled "Back to Mainpage" with a right-pointing arrow.

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

After approval granted by Accreditation and Exemption Committee

- Applicant receives email “Granting of Certified Private Wealth Professional (“CPWP”) Associate Certification (CPWP Associate Certification No. : A20230000XX)”

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/259 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

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

After approval granted by Accreditation and Exemption Committee

- View Certificate's expiry date in **[My Certification/ Apply for Renewal]**
- Go to **[My Application]** to view Application Status

The screenshot shows the user interface of the CPWPA Associate Certification and Renewal Application Platform. At the top left, there is 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). On the top right, the user is logged in as 'Hi CPWPA STUDENT_10' with a notification for 5 messages 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 menu items: 'My Application', 'My Certification / Apply for Renewal' (highlighted with a red box and showing an expiry date of 2024-12-31), 'My Account Information', and 'Reset Password'. Each menu item has a right-pointing arrow.

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

After approval granted by Accreditation and Exemption Committee

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



The screenshot shows the CPWPA Associate Online Platform interface. 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, a welcome message reads "Welcome CPWPA STUDENT_10 to CPWP Associate Online Platform." Below the header 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 "My Application" and contains a table with the following data:

Application No	Applicant Name	Date of Submission to PWMA	Application Status	Originated	Action
A2023000076N	CPWPA STUDENT_10	2023-06-29	Approved		View

Below the table is a "Comment(s)" section with the following text:

2023-06-29 12:07:06 Granting of Certified Private Wealth Professional ("CPWP") Associate Certification (CPWP Associate Certification No. : A2023000080)

34. 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 CPWPA certificate





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	Certified	2024-12-31	▶ View ▶ Update Account Information

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

Online CPWP Associate electronic certificate is available

