

**澳門金融學會、澳門大學及香港銀行學會
合辦
「銀行專業資歷架構－認可財富管理師(澳門)」
[ECF - Certified Retail Wealth Professional Macao (CRWP Macao)]**

課程啟動儀式暨說明會

邀請函

敬啟者：

特具此函誠邀 貴行出席由澳門金融學會(MIFS)、澳門大學(UM)及香港銀行學會(HKIB)共同舉辦之「銀行專業資歷架構－認可財富管理師(澳門)」[ECF - Certified Retail Wealth Professional Macao (CRWP Macao)] 課程啟動儀式及說明會，是次活動將於 2022 年 8 月 22 日以線上形式於港澳兩地同步舉行，敬希 貴行人事部、個人銀行部及財富管理業務部主管及代表蒞臨參加。

自 2018 年 10 月澳門金管局與香港金管局就互認及共同推進「銀行專業資歷架構」(ECF) 簽署合作備忘錄後，為兩地業界提供互認的專業能力標準。作為課程的指定行政管理機構的澳門金融學會及香港銀行學會已於 2019 年 3 月推出首期「銀行專業資歷架構高等證書－打擊洗錢及恐怖分子資金籌集(澳門)」課程。

2022 年 9 月，澳門金融學會及香港銀行學會將偕同澳門大學合作推出符合「銀行專業資歷架構」的「認可財富管理師(澳門)」課程，以取代自 2009 年起由澳門金融學會及香港銀行學會共同推出的「專業財富管理師」課程，此舉旨在更新課程內容，促進港澳兩地的共同專業能力標準的發展，從而鼓勵彼此的資訊共享，實現大灣區的人才互通。

有關啟動儀式暨課程說明會詳情如下：

日期： 2022 年 8 月 22 日(星期一)

時間： 下午 3 時 30 分至下午 6 時

- 3 時 30 分開放登入
- 4 時啟動儀式正式開始
- 4 時 30 分課程說明會，將簡介新課程及其與 CFMP™ 轉換安排

主禮嘉賓：

- 澳門金融管理局行政管理委員會委員**劉杏娟**女士
- 香港金融管理局銀行政策部知識發展及存款保障處主管**陳劍青**女士
- 澳門金融學會管理委員會主席**李可欣**女士
- 澳門大學工商管理學院代院長**葛偉**教授
- 香港銀行學會行政總裁**梁嘉麗**女士

我們恭候並謹請 貴行於 **2022 年 8 月 16 日** 或之前填妥並提交隨函所附之 [電子表格](#)。如有查詢，請電郵至 ifs@macau.ctm.net 或致電澳門金融學會，電話(853)2856 8280。

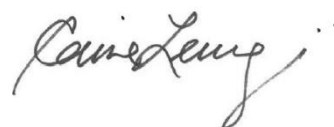
謹此致意！



李可欣
管理委員會主席
澳門金融學會



葛偉
代院長
澳門大學工商管理學院



梁嘉麗
行政總裁
香港銀行學會

The Macau Institute of Financial Services, University of Macau and The Hong Kong Institute of Bankers
The “ECF - Certified Retail Wealth Professional Macao (CRWP Macao)”
Virtual Launch Ceremony cum Information Session

Invitation

On behalf of the Macau Institute of Financial Services (MIFS), University of Macau (UM) and The Hong Kong Institute of Bankers (HKIB), we are writing to cordially invite your presence at the Virtual Launch Ceremony of ECF - Certified Retail Wealth Professional Macao (CRWP) cum Information Session to be held for participants from Hong Kong and Macao on 22 August 2022.

In October 2018, the Monetary Authority of Macao (AMCM) and Hong Kong Monetary Authority (HKMA) signed a ground-breaking memorandum of understanding (MoU) for the mutual recognition of Enhanced Competency Framework (ECF) programmes in Macao and Hong Kong, providing a common professional qualification benchmark for the banking industry. The first Macao ECF programme was "ECF on Anti-Money Laundering and Counter-Financing of Terrorism Macao (Core Level)" (ECF on AML/CFT Macao), launched in March 2019.

In September 2022, MIFS, UM and HKIB will jointly launch the training programme of Certified Retail Wealth Professional Macao (CRWP Macao), which is an eligible programme meeting ECF standards and replaces the "Certified Financial Management Planner™ (CFMP™) Macau" jointly organised by MIFS and HKIB since 2009. The CRWP Macao programme aims to promote knowledge updates and the development of a professional qualification benchmark between the two regions, thereby encouraging information sharing and talent exchange between each other and within Greater Bay Area.

Please refer to the below details:

Date: 22 August 2022 (Monday)

Time: 3:30pm – 6:00pm

- 3:30pm (Open for registration)
- 4:00pm (Virtual Launch Ceremony)
- 4:30pm (Information Session, to introduce new programme and the conversion arrangement between CFMP™ and CRWP Macao)

Guest of Honour:

- **Ms Henrietta LAU**, Executive Director of the Monetary Authority of Macao
- **Ms Carrie CHAN**, Head of Soft Infrastructure & Deposit Protection Division, Banking Policy Department, the Hong Kong Monetary Authority
- **Ms Esther LEI**, Chairperson of the Executive Board of Macau Institute of Financial Services
- **Prof GE Wei**, Interim Dean of Faculty of Business Administration of University of Macau
- **Ms Carrie LEUNG**, Chief Executive Officer of The Hong Kong Institute of Bankers

Grateful if you could complete and submit the [eForm](#) **by 16 August 2022**. Should you have any further queries, please email to ifs@macau.ctm.net or contact MIFS at (853)2856 8280.

We look forward to having your presence at the Ceremony.

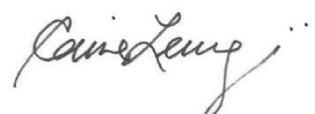
Yours sincerely



Esther LEI
Chairperson of the Executive Board
Macau Institute of Financial Services



GE Wei
Interim Dean of Faculty of Business Administration
University of Macau



Carrie LEUNG
Chief Executive Officer
The Hong Kong Institute of Bankers