

Product Selection ▶

<input type="checkbox"/> Aug 2026 / <input type="checkbox"/> Nov 2026	Online	Schweser Online Resources	Discount Price	Full Price
Delivery mode : Online (Pre-recorded)			enroll on or before 30 Sep 2026	
<input type="checkbox"/> Part I Online Full Package (with Education, Revision Course and Mock Exam & Review)	<input type="checkbox"/> Stephen Wong (Cantonese)	Schweser Essential Package - Part I <b>FREE</b> (Value \$3,900)	<input type="checkbox"/> \$14,400	<input type="checkbox"/> \$16,000
<input type="checkbox"/> Part I Online Revision Course	<input type="checkbox"/> Stephen Wong (Cantonese)	—	<input type="checkbox"/> \$6,600	<input type="checkbox"/> \$7,200
<input type="checkbox"/> Part II Online Full Package (with Education, Revision Course and Mock Exam & Review)	<input type="checkbox"/> Kenneth Leung (Cantonese)	Schweser Essential Package - Part II <b>FREE</b> (Value \$4,300)	<input type="checkbox"/> \$17,200	<input type="checkbox"/> \$19,200
<input type="checkbox"/> Part II Online Revision Course	<input type="checkbox"/> Kenneth Leung (Cantonese)	—	<input type="checkbox"/> \$7,700	<input type="checkbox"/> \$8,700

Schweser Package  Aug 2026 /  Nov 2026

<b>Premium Package</b> Essential Package + OnDemand Class + OnDemand Review Package + Resource Library	<input type="checkbox"/> Part I \$7,000
	<input type="checkbox"/> Part II \$7,400
<b>Essential Package</b> Quicksheet (Print and eBook) + Schweser Mock Exams (1-2) + SchweserPro™ Qbank Instructor Link + SchweserNotes™ (Print, eBook and Online) + Schweser Commitment & PassProtection	<input type="checkbox"/> Part I \$3,900
	<input type="checkbox"/> Part II \$4,300

Others

<b>Schweser PassProtection*</b> *Terms and conditions apply	<input type="checkbox"/> \$0	<b>Shipping Request</b> (applicable to Schweser items only)	<input type="checkbox"/> \$500
--	------------------------------	---	--------------------------------

# Terms and Conditions

## Important

Terms and Conditions are subject to change without notice. Please review the full and most updated version from our website [www.Kaplan.com.hk/kfm](http://www.Kaplan.com.hk/kfm) periodically. All matters are disputes will be subject to the final decision of Kaplan. These Terms and Conditions set out your entire agreement with Kaplan Financial for the particular course and supersede all previous agreements or understandings made (verbally or in writing) in relation to the course.

### Enrollment Policy

1. A completed enrollment form/order form must be accompanied by payment in full. Once your enrollment is completed, you will receive an electronic receipt within 7 working days. If you do not hear from us, please check with us at 2526 3686, by WhatsApp at 5628 8939 or email to [hkfrm@kaplan.com](mailto:hkfrm@kaplan.com). Prices are subject to change, and we reserve the right to charge additional amounts to reflect any pricing changes taking effect before course commencement date(s).
2. Kaplan Financial reserves the right to cancel a course if enrollment is insufficient and/or make alterations regarding lecturers, class location (for face-to-face classes and if applicable), course schedules, topic sequence and time allocated to each topic if necessary. Under such circumstances, fees paid are non-refundable and non-transferrable. If any interruptions may happen, we will notify the students as soon as possible.
3. Course administration details will be emailed to you approximately 3 working days prior to course commencement.

### Attendance Policy

4. Courses are not transferable between individuals. Under all circumstances, nobody except the registered students can participate in the registered course or gain access to student services. Kaplan Financial does not accept substitutes, in whole or in part, to obtain services and attend courses.
5. Shared use of online service is prohibited. Never share your one-time password with anyone.

### Cancellation Policy

6. 50% course fee is refundable at any time up to 2 weeks prior to the course commencement date or the activation of online account. The full listed price of SchweserNotes™ will be charged and deducted from the refund. No refund is allowed thereafter. Cancellations will be subject to an administrative fee of \$400 per course. Cost of any course notes, Kaplan Schweser products and financial calculator are not refundable.
7. Funds received but not utilized or refunded in accordance with these Terms and Conditions will be forfeited to Kaplan Financial.
8. Refund will only be arranged upon the receipt of all necessary documents and course fee paid will be refunded to the participant by cheque or PayDollar.
9. Any request for refund due to extenuating personal reasons will be considered and determined on a case-by-case basis, upon presentation of supporting documentation. The common extenuating reasons are illness, accident, pregnancy and bereavement.
10. The following reasons will not be grounds for refund: students' financial circumstances, failure to register for an exam, taking the exam in a later exam sitting, not pursuing the designation, change of work circumstances (i.e. job, location, working hours, obligations etc), difficulty level of course not suitable, dislike of trainer's presentation style.
11. Students must complete the course in the current exam sitting and are not allowed to transfer or defer any portion of the course and fees to the future exam sittings.

### Live streaming / Online Access

12. Login information will be mailed to users within 7 working days after the completion of enrollment. If you do not hear from us, please contact us either by phone at 2526 3686, by WhatsApp at 5628 8939, or email to [hkfrm@kaplan.com](mailto:hkfrm@kaplan.com)
13. For security purposes, a unique One-Time Password (OTP) will be sent to your email address each time you log in to the eLearning platform. We are unable to resolve issues such as delay, or non-receipt of OTP related to third-party email providers.
14. Kaplan does not warrant that the live streaming and online videos will be uninterrupted or error-free. All live streaming and online videos are provided on an "as is, as available" basis. A substitute video of another trainer, lectured in a different language and pace might be arranged.
15. By using Kaplan eLearning platform, you confirm that you have met the minimum system requirements and are fully satisfied with the playback performance of Kaplan eLearning.
16. Your subscription to Kaplan eLearning is a limited license to use the content only between the time online access is granted and its expiry date (hereinafter referred to "the Subscription Period"). The subscription period varies depending on the class you sign up for. You are responsible for checking this information posted on the Kaplan online store and eLearning platform. Your subscription cannot be extended unless extension option is included in the eLearning class you sign up for and you have met the extension requirements.
17. The courses and products sold in the correspondence courses are intended for personal use only. Sharing or resale of Kaplan materials and/or online access is prohibited. The username/user id and password given by Kaplan cannot be shared with anyone, even if that person has his or her own subscription to Kaplan products and/or services. Kaplan reserves all its rights in the event of a violation of this policy, which may include discontinuation of your license right, immediate suspension of your privileges as a seller and/or user without refund, and enforcement of Kaplan's rights under law and equity. Kaplan will only support registered users who made purchases directly from Kaplan.
18. All of our online videos are produced from the live streaming courses of previous exam window in the same curricular year. Subsequent update/errata will be posted to the eLearning platform, if any.

### Course Materials and Study tool

19. Course materials will be released in phases and will be available as printable soft copies for online courses. Students can access and download the course notes from the eLearning platform and print them as needed. For Schweser products, you are required to collect it in person.
20. You understand that Kaplan may revise the online content, whether in printed, digital or downloadable format, from time to time to meet its training objectives. It may add or remove materials that it considers as unnecessary or no longer relevant for exam preparation. Once the material is removed it will not be accessible and will not be made available upon request.
21. Students should prepare their own study tools including the financial calculator (Texas Instruments BAI1 Plus or HP 12C) when attending to the course. If students have not used HP 12C before, Kaplan Financial recommends Texas Instrument BAI1 Plus.

### Copyright Policy

22. All course materials are for the sole use by registered students only. All materials, in whole or in part, may not be reproduced, shared, rent, copied or transmitted in any format or by any means, electronic or mechanical, including photocopying, recording, or by any information storage and retrieval system, without written permission from Kaplan. Any unauthorized duplication of course materials is a violation of global copyright laws.
23. Video or audio recording devices are prohibited under any circumstances.

### Kaplan Schweser Purchase

24. Sales of all products are final, non-refundable and non-returnable once order is placed, and payment received.
25. Schweser study materials are protected by the laws of copyright of the United States and other countries throughout the world. Unauthorized creation, purchase, photocopy (i.e. pirated, illicit copies), scanning, use and transmitting of these materials, or portions thereof, in any form whatsoever, is a violation of the copyright law. Violators will be reported to the police and HK Customs and Excise Department where they may subject to criminal and civil liability.

26. The Schweser materials purchased are to be used for the purchaser's own personal use and benefit. Unauthorized commercial resale of Schweser materials is prohibited. Shared use of paper materials, and Online Access is prohibited. All products are non-transferable. Users must not share the username and password with anyone. Schweser reserves all its rights in the event of a violation of this policy, which may include suspension of purchaser's privileges and enforcement of Schweser's right under law and equity.
27. After the order is successfully processed, you will receive login information assigned by Kaplan Schweser within (7) seven working days. It is a limited license to use the content only between the times of access is granted and the end of the month after the exam of your enrolled semester (i.e. Expiry for February Schweser online access is the end of March). Kaplan bears no responsibility to extend the access period, regardless of purchasers' actual exam date.
28. Schweser does not warrant that Online Access will be uninterrupted or error-free. Online access to [www.schweser.com](http://www.schweser.com) is provided on an "as is, as available" basis. You agree to meet the minimum system requirements set forth for Kaplan Schweser's electronic products.
29. Date of collection is subject to availability of different materials. Purchasers must present the e-receipt and identity document to collect the materials within the same course semester.
30. Shipping Arrangement - Availability: Products will be time released according to a global availability schedule (subject to change without notice). The estimated delivery date is based on both the product's availability and the applicable shipping time. The shipping time will be arranged within 7 working days upon enrollment. Business days are Monday through Friday. Please call +852 2526 3686 for details.
31. Disclaimer: Orders that are shipped to countries outside of Hong Kong may be subject to import taxes, customs duties and fees levied by the destination country. The recipient of an international shipment may be subject to such fees, which are levied once a shipment reaches the destination country. Additional charges for customs clearance must be borne by the recipient. Kaplan has no control over these charges and cannot predict what they may be. When customs clearance procedures are required, it can cause delays beyond our original delivery estimates. Kaplan will not issue you a refund under such circumstances. For local delivery, it will be arranged within 7 working days upon enrollment. You must ensure that authorized personnel will receive materials on the delivery date. If no one is there to receive parcel, you are responsible to contact the courier service provider for further arrangement. Kaplan will not resend the materials. Extra fees will be stipulated if delivery to local remote or oversea address.

### Schweser's PassProtection™

32. To apply for the Schweser's PassProtection™ and receive the online version of study package FREE of charge for the next exam sitting, you must meet the following criteria:
  - You have purchased the Essential, Premium or Ultimate Packages.
  - You have registered to retake your exam. You must attach the following documents:
    - Exam fail notice for same level / Proof of approval of Deferral from GARP.
    - New exam registration notice for same level.
33. Request must be made by returning the documents indicated above to Kaplan. No deferral, transfers or cancellations of package can be made. Free Package cannot be redeemed for cash.

### Personal Data Protection

34. Your personal data is collected and used by us for processing your application of admission, and for registration, administrative, verification, research, statistical and direct marketing purpose. We may also collect personal information to satisfy legal, government and statutory obligations. Provision of personal data is necessary, and without your personal data, we may not be able to provide you with services you require. We may share and transfer your personal data with other members of the Kaplan group and/or authorized third parties providing services to us in relation to the above purposes and/or other prescribed purposes as allowed by law from time to time. In all such circumstances, data will be treated in strict confidence.
35. Under the provisions of the Personal Data (Privacy) Ordinance, applicants have rights to request access to, and to request correction of, his or her personal data. Applicants wishing to amend his or her data should fill out the prescribed form and submit it to Kaplan. Applicants may opt-out from receiving our direct marketing materials at any time.
36. If you do not wish to receive our offers and updates, please tick the below boxes or email us at [hkmarketing.kf@kaplan.com](mailto:hkmarketing.kf@kaplan.com) to unsubscribe.
  - Unsubscribe from all Kaplan Financial emails, or
  - Unsubscribe from non-Financial emails only
37. For the purposes of providing Kaplan Schweser learning materials to you, we may transfer your name and contact details outside Hong Kong to our agents or affiliates situated in United States, where there may not be in place data protection laws which are substantially similar to, or serve the same purposes as, the Personal Data (Privacy) Ordinance. That means your personal data may not be protected to the same or similar level in Hong Kong. Once you sign this enrollment form, you consent to the transfer of your personal data outside Hong Kong.

### Notes to Applicants from Sanctioned Countries

38. Individuals who are citizens from any of the following countries are unable to enrol to our courses: Afghanistan, Belarus, Colombia, Cuba, Central African Republic, Democratic Republic of the Congo, Democratic People's Republic of Korea, Haiti, Iran, ISIL and Al-Qaida, Libya, Mexico, Myanmar, Russia, Somalia, South Sudan, Sudan, Syria, Ukraine, Venezuela, Yemen, Zimbabwe.
39. Kaplan reserves the right to terminate any enrollment without refund or compensation if any fraudulent information provided by the applicant is discovered.

### Code of Conduct

40. It is the responsibility of every student to be aware of the Kaplan Hong Kong Code of Conduct's content as published in <http://www.kaplan.com.hk/code-of-conduct> and to abide by its provisions.

### Other information

41. Credit Card Interest free installment is applicable to Full Packages only. Cardholders of HSBC/SC VISA/Mastercard can enjoy a 3-month installment and the cardholder has to be the student himself/herself.
42. Your course is registered with the Non-Local Courses Registry, Education Bureau, Course Registration NO.: 361795. It is a matter of discretion for individual employers to recognize any qualification to which this course may lead.
43. These Terms and Conditions set out your entire agreement with Kaplan for the particular course and supersede all previous agreements or understandings made (verbally or in writing) in relation to the course.
44. Terms and Conditions are subject to change without notice. Please review the full and most updated version from our website [www.kaplan.com.hk](http://www.kaplan.com.hk) periodically. All matters and disputes will be subject to the final decision of Kaplan.
45. Kaplan does not warrant the accuracy of the data from GARP which may be subject to changes. All information provided is based on, and subject to, the official materials published by the GARP.

FOR OFFICIAL USE ONLY:

F-SO: \_\_\_\_\_ ST2000: \_\_\_\_\_ PY: \_\_\_\_\_ HKS: \_\_\_\_\_ App#: \_\_\_\_\_ Date: \_\_\_\_\_ Handler: \_\_\_\_\_

**Kaplan Financial (HK) Limited**  
4/F, E-tech Centre, 402-406 Hennessy Road,  
Wanchai, Hong Kong (Causeway Bay MTR Exit A)

**Tel: (852) 2526 3686**  
**Fax: (852) 2501 0589**  
[www.kaplan.com.hk/kfm](http://www.kaplan.com.hk/kfm)  
Email: [hkfm@kaplan.com](mailto:hkfm@kaplan.com)