

List of Currently Approved Type 1 Qualified CPD Activities for Licensed Insurance Intermediaries
現行獲批准的持牌保險中介人第1類合資格的持續專業培訓活動

*(The approval status of the following CPD activities is currently in effect
 以下持續專業培訓活動的核准資格現正生效)*

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Modular design is adopted. In other words, participants can choose to attend part of the activity. If the participant has not attended the CPD activity in full, he/she should only be awarded the number of CPD hours of the module(s) that he/she has attended.

New: Newly approved activities**Renewed:** Approval-Renewed activities

Ref 參考編號	Name of CPD Activity Provider 舉辦機構名稱	Title of Activity 活動名稱	Type of the Activity 活動類別	Virtual Classroom Delivery (for Structured Activity) 虛擬教室授課模式 (適用於有系統的活動)	CPD activity under the category of "Ethics or Regulations" 活動內容為「道德或規例」	No. of CPD hours 持續專業 培訓時數	Current Approval Period 現行 審批期限	Target Participant 培訓對象	Contact 聯絡方法
80/02/52	FWD Life Insurance Company (Bermuda) Limited	Professional Practice Series 理財顧問專業操守系列 *	Structured Activity	No	No	9	1 Sep 2020 - 31 Aug 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Business Partners, potential FWD agents	Ms Ng Siu Kuen, Christine 2281 2705
80/02/66	FWD Life Insurance Company (Bermuda) Limited	FOCUS 180 - Phase 1: Foundation Program FOCUS 180 - 第一階段: 基礎課程 *	Structured Activity	No	No	4	1 Feb 2021 - 31 Jan 2022	In-house 內部員工	Mr Pun Meng In 22812723
80/02/74 Renewed	FWD Life Insurance Company (Bermuda) Limited	Financial Planning Program 理財策劃課程 *	Structured Activity	Yes	No	15	19 Mar 2021 - 18 Mar 2022	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Business Partner	Mr YEUNG Wang Yuk 28423703
80/02/87	FWD Life Insurance Company (Bermuda) Limited	Selling Level Up Series 銷售提升系列 *	Structured Activity	Yes	No	12	6 Apr 2020 - 5 Apr 2021	In-house 內部員工 + Others: Business Partners	Mr Ip Po Hung Rex 2281 2709
80/02/89	FWD Life Insurance Company (Bermuda) Limited	Winning Tactics in Insurance Practice 保險實務全攻略 *	Structured Activity	Yes	No	10	26 Apr 2020 - 25 Apr 2021	In-house 內部員工 + Others: Business Partners	Mr Ip Po Hung Rex 2281 2709
80/02/94	FWD Life Insurance Company (Bermuda) Limited	Elite Manager Builder Series: Recruitment 卓越經理發展課程系列：招募 *	Structured Activity	Yes	No	12	19 Feb 2021 - 18 Feb 2022	In-house 內部員工	Mr Chan Dennis Wai Yip 22812708
80/02/96	FWD Life Insurance Company (Bermuda) Limited	Elite Selling Series 優秀銷售系列 *	Structured Activity	Yes	No	8	6 Apr 2020 - 5 Apr 2021	In-house 內部員工 + Others: Business Partners	Mr Ip Po Hung Rex 2281 2709

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80/02/97	FWD Life Insurance Company (Bermuda) Limited	IIQE Paper II Examination Preparatory Course – General Insurance 保險中介人素質保證計劃考試 卷二備試課程- 一般保險 *	Structured Activity	Yes	No	10	6 Apr 2020 - 5 Apr 2021	In-house 內部員工 + Others: Business Partners	Ms Ng Siu Kuen, Christine 2281 2705
80/02/98	FWD Life Insurance Company (Bermuda) Limited	IIQE Paper 5: Investment-linked Long Term Insurance 保險中介人素質保證計劃卷五: 投資相連長期保險 *	Structured Activity	Yes	No	14	9 Apr 2020 - 8 Apr 2021	Public 公眾人士 + Others: Business Partners	Ms Ng Siu Kuen, Christine 2281 2705
80/02/99	FWD Life Insurance Company (Bermuda) Limited	Uplift Your Career 事業飛躍	Structured Activity	No	No	6	22 Apr 2020 - 21 Apr 2021	In-house 內部員工 + Others: Business Partner	Mr Chan Wai Yip Dennis 2281 2708

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80/02/100	FWD Life Insurance Company (Bermuda) Limited	Preparatory Course for Mandatory Provident Fund Schemes Intermediaries Examination 強制性公積金計劃 中介人考試預備班 *	Structured Activity	No	No	10	22 Apr 2020 - 21 Apr 2021	In-house 內部員工 + Others: Business Partners	Mr IP Po Hung Rex 2281 2709
80/02/101	FWD Life Insurance Company (Bermuda) Limited	Professional Upgrade Series - Medical Critical Illness 專業提升系列 - 醫療危疾 *	Structured Activity	No	No	6	18 May 2020 - 17 May 2021	In-house 內部員工 + Others: Business Partners	Mr Chan Wai Yip Dennis 2281 2708
80/02/102	FWD Life Insurance Company (Bermuda) Limited	Advanced Selling Skills Series 進階銷售技巧系列 *	Structured Activity	No	No	8	19 Nov 2020 - 18 Nov 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Business Partners	Mr Raymond Lee 2842 3764
80/02/103 New	FWD Life Insurance Company (Bermuda) Limited	Financial Quotient Series 財商系列 *	Structured Activity	No	No	14	22 Mar 2021 - 21 Mar 2022	In-house 內部員工 + Commissioning Body 委託機構員工	Mr YEUNG Wang Yuk 28423703
80/04/04	YF Life Insurance International Limited	Fundamental Agency Management Training	Structured Activity	No	No	5.5	1 Jan 2021 - 31 Dec 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers	Miss Athena Ho 29199573
80/04/05	YF Life Insurance International Limited	Investment-Linked Insurance Training	Structured Activity	Yes	No	5.5	1 Jan 2021 - 31 Dec 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers	Miss Athena Ho 29199573
80/04/24	YF Life Insurance International Limited	SuperRecruiter Program	Structured Activity	No	No	11	1 Jan 2021 - 31 Dec 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers	Miss Athena Ho 29199573

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80/04/54	YF Life Insurance International Limited	New consultants orientation program (II) *	Structured Activity	Yes	No	10.5	1 Jan 2021 - 31 Dec 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers	Miss Athena Ho 29199573
80/04/56	YF Life Insurance International Limited	Director Development Program (II)	Structured Activity	Yes	No	10	03 Feb 2021 - 02 Feb 2022	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers	Miss Athena Ho 2919 9573
80/04/57	YF Life Insurance International Limited	Seminars on Financial Planning, Legal & Compliance Knowledge (VI) *	Structured Activity	No	No	10	23 Mar 2020 - 22 Feb 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers	Miss Athena Ho 2919 9573
80/04/58	YF Life Insurance International Limited	Medical & Health Insurance Training Series (VI) *	Structured Activity	No	No	6	13 Apr 2020 - 12 Apr 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers	Miss Athena Ho 2919 9573
80/04/59	YF Life Insurance International Limited	Seminars on Financial Planning, Legal & Compliance Knowledge (VII) *	Structured Activity	No	No	8	4 May 2020 - 3 May 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers	Miss Athena Ho 2919 9573
80/04/60	YF Life Insurance International Limited	Medical & Health Insurance Training Series (VII) *	Structured Activity	No	No	8	3 Aug 2020 - 2 Aug 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers	Miss Athena Ho 29199573
80/04/61	YF Life Insurance International Limited	Conduct Issues and Updates of the MPF System for MPF Intermediaries 強積金中介人操守及強積金制度發展	Structured Activity	Yes	Yes	2	13 Oct 2020 - 12 Oct 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers	Miss Athena Ho 29199573

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80/04/62	YF Life Insurance International Limited	Medical & Health Insurance Training Series (VIII) *	Structured Activity	Yes	No	6	01 Jan 2021 - 31 Dec 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Brokers	Miss Athena HO 29199573
80/04/63	YF Life Insurance International Limited	拓展國內人士市場基礎課程	Structured Activity	No	No	2	8 Mar 2021 - 7 Mar 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 + Brokers	Miss Athena Ho 29199573
80/04/64 New	YF Life Insurance International Limited	Medical & Health Insurance Training Series (IX) *	Structured Activity	Yes	No	6	07 Apr 2021 - 06 Apr 2022	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers	Miss Athena HO 29199573

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80/05/02	AIA International Limited (Incorporated in Bermuda with limited liability)	Preparation Course for Paper 2 - General Insurance Examination 一般保險牌照預備班	Structured Activity	No	No	6	01 Jan 2021 - 31 Dec 2021	In-house 內部員工 + Others: Insurance Brokers with business association with AIA International Ltd.	Mr Pui Kei Patrick CHAN 37284023
80/05/03	AIA International Limited (Incorporated in Bermuda with limited liability)	Preparation Course for Mandatory Provident Fund Schemes Examination 強制性公積金計劃牌照預備班	Structured Activity	No	No	6	01 Jan 2021 - 31 Dec 2021	In-house 內部員工 + Others: Insurance Brokers with business association with AIA International Ltd.	Miss Ho Yi Anjaylia CHAN 37284002
80/05/10	AIA International Limited (Incorporated in Bermuda with limited liability)	Preparation Course for Paper 5 - Investment Linked Long Term Insurance Examination	Structured Activity	No	No	6	1 Mar 2021 - 28 Feb 2022	In-house 內部員工 + Others: Insurance Brokers (Insurance Brokers with business association with AIA HK)	Ms PIK KI HO 37284045
80/05/34	AIA International Limited (Incorporated in Bermuda with limited liability)	MPF Product and Selling Skills Training	Structured Activity	No	No	3.5	11 Apr 2020 - 10 Apr 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Commissioning Body / Insurance Brokers with business association with AIA	Mr Frank Mok 3728 4060

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80/05/112	AIA International Limited (Incorporated in Bermuda with limited liability)	Telemarketing Skill Workshop - Direct Sales Program	Structured Activity	No	No	3	13 Jul 2020 - 12 Jul 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Fan Siu Ping Carol 3108 1389
80/05/113	AIA International Limited (Incorporated in Bermuda with limited liability)	Cold & Warm Calling Skills Workshop	Structured Activity	No	No	7	1 Jul 2020 - 30 Jun 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Fan Siu Ping Carol 3108 1389
80/05/120	AIA International Limited (Incorporated in Bermuda with limited liability)	Market Development Training Series - Market Expansion 市場開發系列 – 擴闊客戶	Structured Activity	No	No	3.5	1 Jul 2020 - 30 Jun 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Insurance Brokers (Insurance Brokers with business association with AIA Hong Kong)	Mr Frank Mok 3728 4060
80/05/128	AIA International Limited (Incorporated in Bermuda with limited liability)	Performance Management and Coaching Workshop	Structured Activity	No	No	7	1 Jun 2020 - 31 May 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Kim Yeung 3728 4042
80/05/131	AIA International Limited (Incorporated in Bermuda with limited liability)	Professional Claims Series - Accident (Module 1 & 2) and Critical Illness (Module 3) *	Structured Activity	No	No	7	11 Aug 2020 - 10 Aug 2021	In-house 內部員工 + Others: Insurance agents / brokers and agents from partner's bank	Mr Frank Mok 3728 4060
80/05/134	AIA International Limited (Incorporated in Bermuda with limited liability)	Phone Skills Enrichment Workshop	Structured Activity	No	No	1	13 Jul 2020 - 12 Jul 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Fan Siu Ping Carol 3108 1389

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80/05/135	AIA International Limited (Incorporated in Bermuda with limited liability)	Professional Claims Series - Hospitalization	Structured Activity	No	No	3.5	6 Jun 2020 - 5 Jun 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Insurance Brokers (Insurance Brokers with business association with AIA Hong Kong)	Mr Frank Mok 3728 4060

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80/05/140	AIA International Limited (Incorporated in Bermuda with limited liability)	The Essential Agency Management (AIA Premier Leaders Academy – Leadership Development Program)	Structured Activity	No	No	12	20 Apr 2020 - 10 Jun 2020	In-house 內部員工 + Others: Insurance Agents	Mr Kelvin Yuen 3728 4068
						10	11 Jun 2020 - 19 Apr 2021		
80/05/141	AIA International Limited (Incorporated in Bermuda with limited liability)	Experienced Financial Planner Training Programme - Orientation	Structured Activity	No	No	3.5	1 Feb 2021 - 31 Jan 2022	In-house 內部員工	Mr Man Kit Sampson HO 37284010
80/05/147	AIA International Limited (Incorporated in Bermuda with limited liability)	Financial Planner Trainee Program - Putonghua 普通話新晉財務策劃 顧問培訓課程	Structured Activity	No	No	8	21 Sep 2020 - 20 Sep 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Financial Planners	Mr Joe Zhou 3728 4012
80/05/162	AIA International Limited (Incorporated in Bermuda with limited liability)	Professional Operations Training Course Series – M1 to M3 *	Structured Activity	No	No	9	1 Jan 2021 - 31 Dec 2021	In-house 內部員工 + Others: Insurance agents/brokers and staff from partner's bank	Mr Ivan Chiu 37284022
80/05/163	AIA International Limited (Incorporated in Bermuda with limited liability)	Financial Planning Training Series - M1 to M4 *	Structured Activity	No	No	13	1 Jan 2021 - 31 Dec 2021	In-house 內部員工 + Others: Insurance agents/brokers and staff from partner's bank	Mr Frank Mok 37284060
80/05/165	AIA International Limited (Incorporated in Bermuda with limited liability)	Recruitment & Selection Workshop	Structured Activity	No	No	4	24 Feb 2020 - 23 Feb 2021	In-house 內部員工	Mr Marco Leung 3728 4011
80/05/166	AIA International Limited (Incorporated in Bermuda with limited liability)	Policy Provision	Structured Activity	No	No	3	1 Jan 2021 - 31 Dec 2021	In-house 內部員工 + Others: Insurance agents/brokers and staff from partner's bank	Mr Frank Mok 37284060

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80/05/167	AIA International Limited (Incorporated in Bermuda with limited liability)	Right Start Selling Skills Training *	Structured Activity	No	No	4	11 May 2020 - 10 May 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers partners and their subsidiaries	Mr Lai Koon Yin 3728 4819
80/05/169	AIA International Limited (Incorporated in Bermuda with limited liability)	Insurance Concept and Policy Provision 保險概念及保單條款解碼 *	Structured Activity	Yes	No	10	1 Dec 2020 - 30 Nov 2021	In-house 內部員工	Miss Chung Ka Lai Cherry 2200 6421
80/05/170	AIA International Limited (Incorporated in Bermuda with limited liability)	Become a Communication Expert	Structured Activity	Yes	No	2	16 Feb 2021 - 15 Feb 2022	In-house 內部員工 + Others: Bank partners, brokers partners and their subsidiaries	Ms Ivy Cheng 37284938
80/05/172	AIA International Limited (Incorporated in Bermuda with limited liability)	iFinancial Health Check 全保理財分析	Structured Activity	No	No	2	1 Jan 2021 - 31 Dec 2021	In-house 內部員工 + Others: Insurance agents/brokers and staff from partner's bank	Mr Frank Mok 37284060
80/05/173 Renewed	AIA International Limited (Incorporated in Bermuda with limited liability)	What is an adequate health solution?	Structured Activity	Yes	No	3	19 Mar 2021 - 18 Mar 2022	In-house 內部員工 + Others: Bank partners, brokers partners and their subsidiaries	Miss Sharon MAN 3728 4929
80/05/174	AIA International Limited (Incorporated in Bermuda with limited liability)	Build Trust from Identifying Behavioural Styles	Structured Activity	Yes	No	2	16 Feb 2021 - 15 Feb 2022	In-house 內部員工 + Others: Bank partners, brokers partners and their subsidiaries	Ms Ivy Cheng 37284938
80/05/175 Renewed	AIA International Limited (Incorporated in Bermuda with limited liability)	Insurance Ethics - The Merit of Utmost Good Faith 道德操守 - 保險誠與信	Structured Activity	Yes	Yes	3	19 Mar 2021 - 18 Mar 2022	Others: Bank partners, brokers partners and their subsidiaries	Miss WONG Pik Kee Peggy 37284926
80/05/176	AIA International Limited (Incorporated in Bermuda with limited liability)	Time Value of Money – Concept and Application 金錢的時間價值 - 概念及應用	E-learning Activity	N/A	No	0.5	17 Apr 2020 - 16 Apr 2021	In-house 內部員工 + Others: AIA Financial Planners (Insurance agents)	Mr Frank Mok 3728 4060

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80/05/177	AIA International Limited (Incorporated in Bermuda with limited liability)	Selling Cycle 銷售循環	E-learning Activity	N/A	No	1.5	01 Jun 2020 - 31 May 2021	In-house 內部員工 + AIA financial Planners (Insurance agents)	Ms Kristen Kwok 3728 4016
80/05/178	AIA International Limited (Incorporated in Bermuda with limited liability)	"CODE OF CONDUCT FOR LICENSED INSURANCE AGENTS" GENERAL PRINCIPLES 《持牌保險代理人操守守則》 一般原則	E-learning Activity	N/A	Yes	1	29 May 2020 - 28 May 2021	In-house 內部員工 + Others: AIA Financial Planners (Insurance agents)	Mrs Nicole Chow 3728 4020
80/05/179	AIA International Limited (Incorporated in Bermuda with limited liability)	Best Practice on Data Privacy, Direct Marketing and Social Media 良好工作習慣: 保障個人資料、直接促銷及社群媒體 的使用	E-learning Activity	N/A	Yes	0.5	1 Jun 2020 - 31 May 2021	In-house 內部員工 + Others: AIA Financial Planners (Insurance agents)	Mrs Nicole Chow 3728 4020
80/05/180	AIA International Limited (Incorporated in Bermuda with limited liability)	Insurance Authority's Regulations on Insurance Intermediaries 保險業監管局對 保險中介人之監管要求	E-learning Activity	N/A	Yes	1	1 Jun 2020 - 31 May 2021	In-house 內部員工 + Others: AIA Financial Planners (Insurance agents)	Mrs Nicole Chow 3728 4020
80/05/181	AIA International Limited (Incorporated in Bermuda with limited liability)	Quality Recruitment - The 5 Great Recruitment Directives 優質招募-5大方向招募	E-learning Activity	N/A	No	1	22 Jun 2020 - 21 Jun 2021	In-house 內部員工 + Others: AIA Financial Planners (Insurance agents)	Mr Ray Hsiao 3728 4038
80/05/176	AIA International Limited (Incorporated in Bermuda with limited liability)	Time Value of Money – Concept and Application 金錢的時間價值 - 概念及應用	E-learning Activity	N/A	No	.5	17 Apr 2021 - 16 Apr 2022	In-house 內部員工 + Others: AIA Financial Planners (Insurance agents)	Mr Frank Mok 37284060
80/05/182	AIA International Limited (Incorporated in Bermuda with limited liability)	Pacesetter - The Management Skills Seminar for a New Generation	Structured Activity	No	No	10	2 Jul 2020 - 1 Jul 2021	In-house 內部員工 + Others: Insurance agency manager	Miss Eyre Cheung 37284025
80/05/183	AIA International Limited (Incorporated in Bermuda with limited liability)	Regulatory Requirements of Guideline 26 on Sale of ILAS Products GL26 銷售投資相連壽險計劃產品指引(ILAS) 監管要求	E-learning Activity	N/A	Yes	0.5	2 Oct 2020 - 1 Oct 2021	In-house 內部員工 + Others: AIA Financial Planners (Insurance agents)	Mrs Nicole Chow 3728 4020
80/05/184	AIA International Limited (Incorporated in Bermuda with limited liability)	GL25 - Guideline on Offering of Gifts 指引25 送贈禮品指引	E-learning Activity	N/A	Yes	0.5	27 Oct 2020 - 26 Oct 2021	In-house 內部員工 + Others: AIA Financial Planners (Insurance agents)	Mrs Nicole Chow 37284020

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80/05/185	AIA International Limited (Incorporated in Bermuda with limited liability)	The Quality Recruitment Workshop 招募新將工作坊	Structured Activity	No	No	12	1 Jan 2021 - 31 Dec 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Fan Siu Ping Carol 31081389
80/05/186	AIA International Limited (Incorporated in Bermuda with limited liability)	AIA Premier Academy – Wealth Management Manager Program	Structured Activity	No	No	10	08 Dec 2020 - 07 Dec 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Kim QIU 37284007
80/05/187	AIA International Limited (Incorporated in Bermuda with limited liability)	Cold & Warm Calling Skills Workshop 拓展生意技巧工作坊	Structured Activity	No	No	12	01 Jan 2021 - 31 Dec 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Ms FAN Siu Ping Carol 31081389
80/05/188	AIA International Limited (Incorporated in Bermuda with limited liability)	GL27 – Guideline on Long Term Insurance Policy Replacement 指引[27- 長期保險保單轉保指引	E-learning Activity	N/A	Yes	.5	23 Dec 2020 - 22 Dec 2021	In-house 內部員工 + Others: AIA Financial Planners (Insurance agents)	Mrs Nicole CHOW 37284020
80/05/189	AIA International Limited (Incorporated in Bermuda with limited liability)	AIA Premier Academy – Executive Development Program	Structured Activity	No	No	10	21 Jan 2021 - 20 Jan 2022	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Kim QIU 37284007
80/05/190	AIA International Limited (Incorporated in Bermuda with limited liability)	Guideline 29 on Cooling-off Period & Guideline 31 on Medical Insurance Business 指引[29-冷靜期指引及指引[31- 醫療保險業務指引	E-learning Activity	N/A	Yes	0.5	4 Jan 2021 - 3 Jan 2022	In-house 內部員工 + Others: AIA Financial Planners (Insurance agents)	Mrs Nicole CHOW 37284020
80/05/191	AIA International Limited (Incorporated in Bermuda with limited liability)	Professional Operation Course Series 營運專業培訓課程 *	Structured Activity	No	No	2.5	31 Jan 2021 - 30 Jan 2022	In-house 內部員工 + Others: AIA Financial Planners (Insurance agents)	Mr Ivan CHIU 37284022
80/05/192	AIA International Limited (Incorporated in Bermuda with limited liability)	Financial Planner Trainee Program	Structured Activity	No	No	10	15 Jan 2021 - 14 Jan 2022	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Man Kit Sampson HO 37284010
80/05/193	AIA International Limited (Incorporated in Bermuda with limited liability)	The Roadshow Workshop 路演工作坊	Structured Activity	No	No	12	22 Feb 2021 - 21 Feb 2022	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Fan Siu Ping Carol 31081389
80/05/194 New	AIA International Limited (Incorporated in Bermuda with limited liability)	Guideline 30 on Financial Needs Analysis 指引[30-財務需要分析指引	E-learning Activity	N/A	Yes	1.5	29 Mar 2021 - 28 Mar 2022	In-house 內部員工 + Others: AIA Financial Planners (Insurance agents)	Mrs Nicole CHOW 37284020

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80/06/31	Hong Kong Securities and Investment Institute	Overview of Legal and Regulatory Framework for Securities and Futures Industry	Structured Activity	No	No	5	25 Nov 2020 - 24 Nov 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Carina Yuen 3120 6203
80/06/37	Hong Kong Securities and Investment Institute	Overview of the new regulatory framework under Insurance Ordinance	Structured Activity	No	No	2	14 Sep 2020 - 13 Sep 2021	Public 公眾人士	Ms Carina Yuen 3120 6203
80/07/06	Institute of Professional Education and Knowledge, VTC	Employees' Compensation Ordinance (with optional module of Employees' Compensation Insurance and/or Historical Claims Development of Employees' Compensation) “僱員補償條例”及／或選修個別單元，“僱員補償保險”，及／或選修個別單元“僱員補償理賠沿革”*	Structured Activity	Yes	No	16	1 Feb 2021 - 31 Jan 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly TAM 2836 1822
80/07/07	Vocational Training Council Institute of Professional Education And Knowledge	Hong Kong Insurance Legal Cases (with optional module of Alternative Insurance Dispute Resolution and/or Liability Insurance) *	Structured Activity	Yes	No	16	1 Mar 2021 - 28 Feb 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822

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80/07/10	Institute of Professional Education and Knowledge, VTC	"Certificate Course in Legal Liability Part I-Negligence and Vicarious Liability" with Optional modules of "Part II-Occupiers Liability and Product Liability" and/or "Part III-Strict	Structured Activity	Yes	No	30	1 May 2020 - 30 Apr 2021	In-house 內部員工 + Public 公眾人士	Mr Lau Cheung Wing Eddy 2836 1863
80/07/12	Institute of Professional Education and Knowledge, VTC	Legal Knowledge for Life Insurance Selling	Structured Activity	Yes	No	5 (Long Version)	1 Jun 2020 - 31 May 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Hedley Chow 2836 1864
						3 (Shorter Version 1)			
80/07/13	Institute of Professional Education and Knowledge, VTC	"Certificate Course in Insurance of Financial Risks Part I – Directors & Officers" with Optional modules of "Part II – Professional Indemnity" with Optional modules of "Part III – Contingency, Fidelity Guarantee, E- commerce, Employment Practices" with Optional modules of "Part IV – Credit" with Opti "財務風險保險證書課程 第一單元 – 董事及高級職員責任險" 及/或 選修個別單元 "第二單元	Structured Activity	Yes	No	15	1 May 2020 - 30 Apr 2021	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Lau Cheung Wing Eddy 2836 1863

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80/07/14	Institute of Professional Education and Knowledge, VTC	"Commercial Insurance And Related Legal Provisions" (with optional module of Law relating to Commercial Insurance and/or Commercial Insurance Coverage and/or Commercial Insurance Claims & Indemnity and/or Legal Interpretation of Interruption Policy)	Structured Activity	Yes	No	15	1 Sep 2020 - 31 Aug 2021	In-house 內部員工 + Public 公眾人士 + Commissioning Body	Mr Lau Cheung Wing Eddy 2836 1863
80/07/16	Institute of Professional Education and Knowledge, VTC	"Statutory Insurance – Motor" with Optional Modules of "Insurance Policy Drafting and Underwriting" and/or "Motor Vehicle Damage Surveying" and/or "Introduction to Claims" 《強制性保險條例 – 汽車》及/或選修個別單元《保單草擬及承保》及/或《車輛損毀調查》,及/或《索償概論》*	Structured Activity	No	No	15	1 Oct 2020 - 30 Sep 2021	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Lau Cheung Wing Eddy 2836 1863
80/07/18	Institute of Professional Education and Knowledge, VTC	Financial Planning (Estate Planning Inheritance and Probate) 財務策劃 (遺產繼承與承辦)*	Structured Activity	Yes	No	10	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Hedley Chow 2836 1864

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80/07/20	Institute of Professional Education and Knowledge, VTC	“Statutory Insurance - Employees' Compensation” with Optional Modules of “Mediation & Alternative Dispute Resolution Practice” and/or “A Comparison	Structured Activity	Yes	No	15	1 Oct 2020 - 30 Sep 2021	In-house 內部員工 + Public 公眾人士	Mr Lau Cheung Wing Eddy 2836 1863
80/07/26	Vocational Training Council Institute of Professional Education And Knowledge	Law Relating to Asset Protection 資產保障相關法律*	Structured Activity	Yes	No	10 (Long Version)	1 Mar 2021 - 28 Feb 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
						4 (Shorter Version 1)			
						3 (Shorter Version 2)			

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80/07/27	Institute of Professional Education and Knowledge, VTC	Duties of Fiduciaries and Criminal Law 受信人責任與刑事法 *	Structured Activity	No	No	10	1 Sep 2020 - 31 Aug 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Hedley Chow 2836 1864
80/07/37 Renewed	Vocational Training Council Institute of Professional Education And Knowledge	Boost your work competence with NLP 「身心語言程式學」工作坊*	Structured Activity	Yes	No	16	01 Apr 2021 - 31 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly TAM 2836 1822
80/07/41	Vocational Training Council Institute of Professional Education And Knowledge	Health Insurance 健康保險 *	Structured Activity	Yes	No	20	01 Jan 2021 - 31 Dec 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly TAM 2836 1822
80/07/42	Institute of Professional Education and Knowledge, VTC	"Communicating without Talking" for Financial Professionals 「不言而喻」的奧妙 - 保險從業員工作坊*	Structured Activity	Yes	No	8 (Normal Version)	1 Dec 2020 - 30 Nov 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
						5 (Shorter Version 1)			
						3 (Shorter Version 2)			
80/07/49	Institute of Professional Education and Knowledge, VTC	Business Networking Workshop for Insurance Practitioners 商務人際網絡的建立 - 保險從業員工作坊 *	Structured Activity	No	No	16 (Long Version)	1 Sep 2020 - 31 Aug 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
						3 (Shorter Version 1)			

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80/07/50	Vocational Training Council Institute of Professional Education And Knowledge	Industry Analysis and Stock Investment Series for Insurance Practitioners 保險從業員的行業分析與股票投資系列 *	Structured Activity	Yes	No	15	1 Mar 2021 - 28 Feb 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/52 Renewed	Vocational Training Council Institute of Professional Education And Knowledge	Travel Insurance 旅遊保險 *	Structured Activity	Yes	No	12	01 Apr 2021 - 31 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly TAM 2836 1822
80/07/55	Institute of Professional Education and Knowledge, VTC	Advanced Technical Analysis 股市技術分析進階課程 *	Structured Activity	Yes	No	16	1 May 2020 - 30 Apr 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/56	Institute of Professional Education and Knowledge, VTC	Master Your Memory for Business Success (Insurance Professionals) Workshop 記憶致勝(保險專業人士) 學習坊 *	Structured Activity	Yes	No	16 (Long Version)	1 May 2020 - 30 Apr 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
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80/07/57	Institute of Professional Education and Knowledge, VTC	Current Development on Investment Products Module 1-5 投資產品發展近況單元一至五 *	Structured Activity	Yes	No	16	1 Sep 2020 - 31 Aug 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/58	Institute of Professional Education and Knowledge, VTC	Creative Thinking Techniques for Business and Personal Enhancement (Insurance Professionals) Workshop 創意增值 (保險專業人士)研習坊 *	Structured Activity	Yes	No	16	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/59	Institute of Professional Education and Knowledge, VTC	Transcend Your Personal Effectiveness (Insurance & Investment Professionals Series) 個人績效登峰(保險及投資專才系列) *	Structured Activity	Yes	No	16	5 Jan 2021 - 4 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly TAM 2836 1822
80/07/60	Institute of Professional Education and Knowledge, VTC	Risk Assessment and Management for Financial Service Executives 風險評估及管理(財經業人士) *	Structured Activity	Yes	No	16	5 Jan 2021 - 4 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly TAM 2836 1822
80/07/62	Institute of Professional Education and Knowledge, VTC	Selling Genius Workshop (Insurance & Investment Professionals) 銷售奇才研習坊 (保險及投資專業人士) *	Structured Activity	Yes	No	16	1 May 2020 - 30 Apr 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/65	Institute of Professional Education and Knowledge, VTC	DISC Profiling for Business and Personal Enhancement (Insurance & Investment Professionals) Workshop DISC性格創富 [保險及投資專業人士]學習坊 *	Structured Activity	Yes	No	16	1 Sep 2020 - 31 Aug 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/66	Institute of Professional Education and Knowledge, VTC	Investment Strategies Series 投資策略系列 *	Structured Activity	Yes	No	16	1 Dec 2020 - 30 Nov 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/67	Institute of Professional Education and Knowledge, VTC	Key Economic Indicators and Investment Planning 主要經濟指標與投資策劃 *	Structured Activity	Yes	No	16	1 Feb 2021 - 31 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly TAM 2836 1822
80/07/68	Institute of Professional Education and Knowledge, VTC	Sales Compliance Reviews and Updates for Financial Products Intermediaries 銷售合規須知及最新修訂(金融產品中介人) *	Structured Activity	Yes	No	13	1 Feb 2021 - 31 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly TAM 2836 1822

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80/07/69	Institute of Professional Education and Knowledge, VTC	Investing in Commodities Series 商品投資系列 *	Structured Activity	Yes	No	16	1 Jun 2020 - 31 May 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/70	Institute of Professional Education and Knowledge, VTC	Dealing with Business and People Successfully in the Internet Age (Financial Service Professionals) 互聯網時代的商機和人事 (金融服務專業人員) *	Structured Activity	Yes	No	16	1 Jun 2020 - 31 May 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/71	Institute of Professional Education and Knowledge, VTC	Persuasion Skills for Financial Professionals 說服技巧(金融服務專業才) *	Structured Activity	Yes	No	16	1 Sep 2020 - 31 Aug 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/72	Institute of Professional Education and Knowledge, VTC	Asian Securities Markets 亞洲證券市場 *	Structured Activity	Yes	No	14	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/73	Institute of Professional Education and Knowledge, VTC	Boost your work competence with NLP (Module 5-8) 「身心語言程式學」工作坊(單元 5- 8) *	Structured Activity	Yes	No	16	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/75	Institute of Professional Education and Knowledge, VTC	Know Your Customers' Investment Psychology (客戶投資心理解說) *	Structured Activity	Yes	No	11	5 Jan 2021 - 4 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly TAM 2836 1822
80/07/76	Institute of Professional Education and Knowledge, VTC	Sales Essentials for Financial Professionals 銷售要訣(財經專才系列) *	Structured Activity	Yes	No	16	1 Jan 2021 - 31 Dec 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/78	Institute of Professional Education and Knowledge, VTC	Understanding Mainland Financial System 內地金融制度入門 *	Structured Activity	Yes	No	18	1 Aug 2020 - 31 Jul 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822

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80/07/79	Institute of Professional Education and Knowledge, VTC	Business Ethics in the Finance Sector 商業道德操守(金融業) *	Structured Activity	No	No	16	1 Aug 2020 - 31 Jul 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/80	Institute of Professional Education and Knowledge, VTC	Liability in Cyber Age and Associated Insurance 網絡世紀中的法律責任及相關保險 *	Structured Activity	Yes	No	8	1 Sep 2020 - 31 Aug 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Hedley Chow 2836 1864
80/07/83	Institute of Professional Education and Knowledge, VTC	Strengthening Your Influential Power Course 強化影響力課程 *	Structured Activity	Yes	No	16	1 Dec 2020 - 30 Nov 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/84	Institute of Professional Education and Knowledge, VTC	MPF Training Programme 強積金培訓 *	Structured Activity	Yes	No	8	5 Jan 2021 - 4 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms POLLY TAM 28361822
80/07/85	Institute of Professional Education and Knowledge, VTC	Advanced Skills in Handling Financial Disputes and Preparing for the FDRC Workshop 處理金融糾紛的準備和進階技巧課程 *	Structured Activity	Yes	No	10	1 Feb 2021 - 31 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly TAM 2836 1822
80/07/87	Institute of Professional Education and Knowledge, VTC	Social Media Marketing and Cloud Competitive Advantages for Financial Professionals 社交媒體和雲端競爭優勢[金融專才] *	Structured Activity	Yes	No	17	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/88	Institute of Professional Education and Knowledge, VTC	China Real Estate Investment Strategies 中國房地產投資策略 *	Structured Activity	Yes	No	14	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/89	Institute of Professional Education and Knowledge, VTC	Essential Skills for Change Management 變革管理技巧 *	Structured Activity	Yes	No	12	1 Dec 2020 - 30 Nov 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822

Ref 參考編號	Name of CPD Activity Provider 舉辦機構名稱	Title of Activity 活動名稱	Type of the Activity 活動類別	Virtual Classroom Delivery (for Structured Activity) 虛擬教室授課模式 (適用於有系統的活動)	CPD activity under the category of "Ethics or Regulations" 活動內容為「道德或規例」	No. of CPD hours 持續專業 培訓時數	Current Approval Period 現行 審批期限	Target Participant 培訓對象	Contact 聯絡方法
80/07/90	Institute of Professional Education and Knowledge, VTC	Life and Medical Insurance 壽險及醫療險 *	Structured Activity	Yes	No	6 (Long Version)	1 Dec 2020 - 30 Nov 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
						5 (Shorter Version)			
80/07/91	Institute of Professional Education and Knowledge, VTC	Mind Management Series - Stress Management 心靈管理系列 - 壓力管理 *	Structured Activity	Yes	No	16	1 Dec 2020 - 30 Nov 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/92	Institute of Professional Education and Knowledge, VTC	Understanding RMB Internationalization and Financial Instruments 人民幣國際化和金融工具 *	Structured Activity	Yes	No	14	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/93	Institute of Professional Education and Knowledge, VTC	Legacy Planning and Legacyology 傳承規劃和傳承學*	Structured Activity	Yes	No	18.5 (Normal Version)	1 Dec 2020 – 30 Nov 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
						17 (Shorter Version)			
80/07/94	Institute of Professional Education and Knowledge, VTC	Customer Experience Management 客戶體驗管理 *	Structured Activity	Yes	No	17 (Long Version)	5 Jan 2021 - 4 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly TAM 2836 1822
						14 (Shorter Version 1)			
80/08/98 Renewed	Hang Seng Bank Ltd.	Trade and Receivables Finance Solutions Walk-through Nil	Structured Activity	Yes	No	4	05 Mar 2021 - 04 Mar 2022	In-house 內部員工	Mr LIU Ka Wing 3662 5304
80/07/99	Institute of Professional Education and Knowledge, VTC	Achieving Wealth Management Excellence Series 財富管理技巧深造系列 *	Structured Activity	Yes	No	14	1 Sep 2020 - 31 Aug 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822

Ref 參考編號	Name of CPD Activity Provider 舉辦機構名稱	Title of Activity 活動名稱	Type of the Activity 活動類別	Virtual Classroom Delivery (for Structured Activity) 虛擬教室授課模式 (適用於有系統的活動)	CPD activity under the category of "Ethics or Regulations" 活動內容為「道德或規例」	No. of CPD hours 持續專業 培訓時數	Current Approval Period 現行 審批期限	Target Participant 培訓對象	Contact 聯絡方法
80/07/101	Institute of Professional Education and Knowledge, VTC	Professional Etiquette and Manners to Impress Your Mainland High Net-worth Customers 接待內地高端客戶的專業禮儀 *	Structured Activity	Yes	No	10 (Long Version)	5 Jan 2021 - 4 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly TAM 2836 1822
						7 (Shorter Version 1)			
80/07/102 Renewed	Vocational Training Council Institute of Professional Education And Knowledge	Common Personal Insurance Claims Disputes	Structured Activity	Yes	No	3	01 Apr 2021 - 31 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly TAM 2836 1822

Ref 參考編號	Name of CPD Activity Provider 舉辦機構名稱	Title of Activity 活動名稱	Type of the Activity 活動類別	Virtual Classroom Delivery (for Structured Activity) 虛擬教室授課模式 (適用於有系統的活動)	CPD activity under the category of "Ethics or Regulations" 活動內容為「道德或規例」	No. of CPD hours 持續專業 培訓時數	Current Approval Period 現行 審批期限	Target Participant 培訓對象	Contact 聯絡方法
80/07/103	Vocational Training Council Institute of Professional Education And Knowledge	Family Laws for Financial Planners 家庭法 (理財策劃師須知)	Structured Activity	Yes	No	5 (Long Version)	1 Mar 2021 - 28 Feb 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
						3 (Shorter Version 1)			
80/07/107	Institute of Professional Education and Knowledge, VTC	Regulatory Requirements for Selling Financial Products Updates 銷售金融產品的監管要求新知 *	Structured Activity	Yes	No	27	1 May 2020 - 30 Apr 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/108	Institute of Professional Education and Knowledge, VTC	Introduction to Mainland Commercial Law for Financial Professionals 內地商務法例入門 (金融專業) *	Structured Activity	Yes	No	18	1 May 2020 - 30 Apr 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/110	Institute of Professional Education and Knowledge, VTC	Employee Benefits Series 僱員福利系列 *	Structured Activity	Yes	No	15	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Hedley Chow 2836 1864
80/07/112	Institute of Professional Education and Knowledge, VTC	HK & China Investment Outlook Seminar 中港投資展望 *	Structured Activity	Yes	No	8	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822

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80/07/113	Institute of Professional Education and Knowledge, VTC	Significant Changes to Insurance Industry Regulation 保險業監管制度的重大修訂*	Structured Activity	Yes	No	8 (Long Version)	1 Feb 2021 - 31 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly TAM 2836 1822
						5 (Shorter Version 1)			
80/07/114	Institute of Professional Education and Knowledge, VTC	Bankruptcy Laws Relating to Credit Risk and Insurance *	Structured Activity	Yes	No	10 (Long Version)	1 May 2020- 30 Apr 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Hedley Chow 2836 1864
						6 (Shorter Version 1)			
80/07/116	Vocational Training Council Institute of Professional Education And Knowledge	Mainland Contemporary Financial Topics 內地當前財經熱話*	Structured Activity	Yes	No	32	1 Mar 2021 - 28 Feb 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/118	Institute of Professional Education and Knowledge, VTC	Empathy and Soft Skills in Customer Service 同理心與其他客服技巧	Structured Activity	No	No	4	1 Mar 2020 - 28 Feb 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/121	Institute of Professional Education and Knowledge, VTC	Securities Analysis Approaches That Have Stood The Test Of Time 已經站穩時間考驗的證券分析方法*	Structured Activity	Yes	No	18	1 Feb 2021 - 31 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly TAM 2836 1822

Ref 參考編號	Name of CPD Activity Provider 舉辦機構名稱	Title of Activity 活動名稱	Type of the Activity 活動類別	Virtual Classroom Delivery (for Structured Activity) 虛擬教室授課模式 (適用於有系統的活動)	CPD activity under the category of "Ethics or Regulations" 活動內容為「道德或規例」	No. of CPD hours 持續專業 培訓時數	Current Approval Period 現行 審批期限	Target Participant 培訓對象	Contact 聯絡方法
80/07/122	Institute of Professional Education and Knowledge, VTC	Global Taxation Overview 環球稅制概覽*	Structured Activity	Yes	No	8 (Long Version)	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
						6 (Shorter Version 1)			
80/07/130 Renewed	Vocational Training Council Institute of Professional Education And Knowledge	Essential Technical Insurance knowledge for effective service quality enhancement 優越服務必須掌握的保險知識*	Structured Activity	Yes	No	24	01 Apr 2021 - 31 Mar 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly TAM 2836 1822
80/07/131 Renewed	Vocational Training Council Institute of Professional Education And Knowledge	Product Liability Insurance for Manufacturers and Exporters 產品責任保險(承保製造商及出口 商)*	Structured Activity	Yes	No	5 (Long Version)	01 Apr 2021 - 31 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly TAM 2836 1822
						3 (Shorter Version 1)			
80/07/132 Renewed	Vocational Training Council Institute of Professional Education And Knowledge	FinTech & The Finance Industry 金融科技與金融業*	Structured Activity	Yes	No	14	18 Apr 2021 - 17 Apr 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly TAM 2836 1822
80/07/134	Institute of Professional Education and Knowledge, VTC	Enhancing Interpersonal Relationships – Enneagram 提升人際關係 – 九型人格*	Structured Activity	Yes	No	7 (Long Version)	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Flora Chan 2836 1855
						6 (Shorter Version 1)			

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80/07/135	Vocational Training Council Institute of Professional Education And Knowledge	Health Management Series 健康管理與養生系列 *	Structured Activity	Yes	No	15	1 Dec 2020 - 30 Nov 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/140	Institute of Professional Education and Knowledge, VTC	Retirement Planning & Current Issues in the Insurance Industry 退休計劃與保險業當前熱話 *	Structured Activity	Yes	No	6 (Normal Version)	1 Dec 2020 - 30 Nov 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
						3 (Shorter Version 1)			
						5 (Shorter Version 2)			
80/07/141	Institute of Professional Education and Knowledge, VTC	Behavioral Economics for the Finance Industry 行為經濟學(金融業) *	Structured Activity	Yes	No	6	1 Feb 2021 - 31 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly TAM 2836 1822
80/07/142	Institute of Professional Education and Knowledge, VTC	Cyber Security in Financial Services 金融服務的網絡安全 *	Structured Activity	Yes	No	8	25 May 2020 - 24 May 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Flora Chan 2836 1855
80/07/143	Institute of Professional Education and Knowledge, VTC	Electronic Financial Service and Big Data 電子金融服務與大數據 *	Structured Activity	Yes	No	16	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822

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80/07/144	Institute of Professional Education and Knowledge, VTC	FinTech, Insurtech & Creative Business Management 金融科技 (FinTech)、保險金融科技(Insurtech)與創意營商管理 *	Structured Activity	Yes	No	23	1 Jan 2021 - 31 Dec 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/145	Institute of Professional Education and Knowledge, VTC	Basic Medical Knowledge & Related Insurance 基本醫學知識與相關保險 *	Structured Activity	Yes	No	8	15 Jan 2021 - 14 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms POLLY TAM 28361822
80/07/147	Institute of Professional Education and Knowledge, VTC	How to Live a Healthy Life 如何活得健康 *	Structured Activity	Yes	No	8	1 May 2020 - 30 Apr 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Hedley Chow 2836 1864
80/07/148	Institute of Professional Education and Knowledge, VTC	打開向高資產客戶銷售 保險的大門 *	Structured Activity	Yes	No	6	1 May 2020 - 30 Apr 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Hedley Chow 2836 1864
80/07/149	Institute of Professional Education and Knowledge, VTC	Socially Responsible Investing (SRI) Series 社會責任投資 (SRI) 系列 *	Structured Activity	Yes	No	9	1 Jul 2020 - 30 Jun 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/150	Institute of Professional Education and Knowledge, VTC	5G and the Finance Industry 5G與金融業 *	Structured Activity	Yes	No	10	1 Aug 2020 - 31 Jul 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/151	Institute of Professional Education and Knowledge, VTC	Advanced Technical Analysis – Ichimoku 進階圖表走勢理論 - 一目均衡圖 *	Structured Activity	Yes	No	8	1 Sep 2020 - 31 Aug 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822

Ref 參考編號	Name of CPD Activity Provider 舉辦機構名稱	Title of Activity 活動名稱	Type of the Activity 活動類別	Virtual Classroom Delivery (for Structured Activity) 虛擬教室授課模式 (適用於有系統的活動)	CPD activity under the category of "Ethics or Regulations" 活動內容為「道德或規例」	No. of CPD hours 持續專業 培訓時數	Current Approval Period 現行 審批期限	Target Participant 培訓對象	Contact 聯絡方法
80/07/152	Institute of Professional Education and Knowledge, VTC	Advanced Technical Analysis – Gann Theory 進階圖表走勢理論 - 江恩理論 *	Structured Activity	Yes	No	8	1 Sep 2020 - 31 Aug 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/153	Institute of Professional Education and Knowledge, VTC	Technical Analysis – Basic Charting 圖表走勢理論 – 基本圖表分析 *	Structured Activity	Yes	No	8	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/154	Institute of Professional Education and Knowledge, VTC	Advanced Technical Analysis – Japanese Candlesticks 進階圖表走勢理論 - 陰陽燭 *	Structured Activity	Yes	No	8	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/155	Institute of Professional Education and Knowledge, VTC	Advanced Technical Analysis – Dow Theory 進階圖表走勢理論 - 道氏理論 *	Structured Activity	Yes	No	8	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/156	Institute of Professional Education and Knowledge, VTC	Advanced Technical Analysis – Elliott Wave Theory 進階圖表走勢理論 – 波浪理論 *	Structured Activity	Yes	No	8	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/157	Institute of Professional Education and Knowledge, VTC	Advanced Technical Analysis – Point & Figure Chart 進階圖表走勢理論 – 點數圖 *	Structured Activity	Yes	No	8	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/158	Institute of Professional Education and Knowledge, VTC	Advanced Technical Analysis – Patterns Analysis 進階圖表走勢理論 – 形態分析 *	Structured Activity	Yes	No	8	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/159	Institute of Professional Education and Knowledge, VTC	Derivative Financial Instruments 金融衍生工具 *	Structured Activity	Yes	No	16	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822

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80/07/161	Institute of Professional Education and Knowledge, VTC	The Cyber Economy New Normal 網路經濟新常态*	Structured Activity	Yes	No	19	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/162	Institute of Professional Education and Knowledge, VTC	Compliance Training Courses for Insurance Agents 合規培訓課程(保險代理人)*	Structured Activity	Yes	Yes	6	17 Dec 2020 - 16 Dec 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/163	Vocational Training Council Institute of Professional Education And Knowledge	Basic Medical Knowledge & Related Insurance II 基本醫學知識與相關保險 II*	Structured Activity	Yes	No	11	09 Jan 2021 - 08 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms POLLY TAM 28361822
80/07/165	Vocational Training Council Institute of Professional Education And Knowledge	The New Solution of Sales Management (Insurance and Investment Professionals) 銷售管理新方向系列 (保險及投資專業人士)*	Structured Activity	Yes	No	9	13 Mar 2021 - 12 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/166	Institute of Professional Education and Knowledge, VTC	Business Ethics in the Finance Sector 商業道德操守(金融業)*	E-learning Activity	N/A	Yes	2	12 May 2020 - 31 Aug 2020	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
						5	1 Sep 2020 - 11 May 2021		
80/07/167	Vocational Training Council Institute of Professional Education And Knowledge	Anti-Money Laundering and Counter-Terrorist Financing Ordinance and Relevant Regulatory Requirements 打擊洗錢及恐怖分子資金籌集條例和相關監管要求*	Structured Activity	Yes	Yes	9	6 Oct 2020 - 5 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/168	Institute of Professional Education and Knowledge, VTC	NLP Telephone Service Skills NLP電話服務技巧*	Structured Activity	Yes	No	14	5 Jan 2021 - 4 Jan 2022	Commissioning Body 委託機構員工	Ms Polly TAM 2836 1822
80/07/169	Institute of Professional Education and Knowledge, VTC	Business Ethics 商業道德操守*	Structured Activity	Yes	Yes	10	29 Jan 2021 - 28 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly TAM 2836 1822
80/07/170	Institute of Professional Education and Knowledge, VTC	Best Practices for Financial Products Intermediaries 金融產品中介人實務須知*	Structured Activity	Yes	No	10	18 Jan 2021 - 17 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly TAM 2836 1822
80/07/171	Vocational Training Council Institute of Professional Education And Knowledge	Compliance Training Courses for Insurance Agents(eCPD) 保監局對保險中介人的操守要求(eCPD)	E-learning Activity	N/A	Yes	3	8 Feb 2021 - 7 Feb 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 28361822

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80/07/172	Vocational Training Council Institute of Professional Education And Knowledge	Regulatory Requirements for Selling Financial Products Updates 銷售金融產品的監管要求新知 *	Structured Activity	Yes	Yes	14	1 Mar 2021 - 28 Feb 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 28361822
80/08/99	Hang Seng Bank Ltd.	Factory Visit Training (Practice with virtual reality)	Structured Activity	No	No	4	1 Mar 2021 - 28 Feb 2022	In-house 內部員工	Mr Liu Ka Wing 3662 5304
80/08/100	Hang Seng Bank Ltd.	2020 CPD Courses for Branch Operational Staff *	Structured Activity	No	No	6	5 Jun 2020 - 4 Jun 2021	In-house 內部員工	Miss Wan Ho Kwan, Carman 3662 5310
80/08/101	Hang Seng Bank Ltd.	Sales Conduct Enhancement Workshop	Structured Activity	No	No	3	5 Jun 2020 - 4 Jun 2021	In-house 內部員工	Mr Liu Ka Wing 3662 5304
80/08/102	Hang Seng Bank Ltd.	Conduct and Business Ethics	Structured Activity	Yes	Yes	4	12 Jun 2020 - 11 Jun 2021	In-house 內部員工	Mr Liu Ka Wing 3662 5304
80/08/103	Hang Seng Bank Ltd.	People Managers' Accountability 2.0	Structured Activity	No	No	4	12 Jun 2020 - 11 Jun 2021	In-house 內部員工	Ms Chan Suk Ching 3662 5303
80/08/104	Hang Seng Bank Ltd.	Sales Conduct & Fraud Awareness Reinforcement Workshop for the Private Bank	Structured Activity	Yes	Yes	3	20 Oct 2020 - 19 Oct 2021	In-house 內部員工	Mr Yiu Chung Francis Ng 3662 5308
80/08/105	Hang Seng Bank Ltd.	Updates on New Regulatory Regime for Insurance Intermediaries	Structured Activity	Yes	Yes	2	8 Mar 2021 - 7 Mar 2022	In-house 內部員工	Ms Chan Suk Ching 3662 5303
80/10/33 Renewed	FTLife Insurance Company Limited	Recruitment Skill Workshop 優才入富招募技巧工作坊	Structured Activity	Yes	No	6	10 Mar 2021 - 09 Mar 2022	In-house 內部員工 + Commissioning Body 委託機構員工	Miss Vienna KAN 26256327
80/10/34	FTLife Insurance Company Limited	New Trend of Insurance Market 保險市場新趨勢 *	Structured Activity	Yes	No	3	22 May 2020 - 21 May 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers and IFAs	Miss Astor Lau 2625 6332

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80/10/35	FTLife Insurance Company Limited	Applying Trust in Financial Planning for High Net Worth Clients 利用信託工具滿足高端客戶財務策劃需要	Structured Activity	Yes	No	2	22 May 2020 - 21 May 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Henry Hsu 2625 6383
80/10/36	FTLife Insurance Company Limited	FTLife Leadership and Agency Management Essentials 101 富通領袖培育及團隊管理課程101 *	Structured Activity	Yes	No	24	14 May 2020 - 13 May 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Miss Gorly Ha 2625 6303
80/10/38	FTLife Insurance Company Limited	FTLife Elite Program (FTLife Dragon Elite Program) 富通優才培訓課程 (御龍優才培訓課程) *	Structured Activity	Yes	No	10	14 Jun 2020 - 13 Jun 2021	In-house 內部員工 + Others: IFA and Brokers	Miss Nicole Yip 2625 6331
80/10/39	FTLife Insurance Company Limited	FTLife Financial Planning Advisor Basic Program 富通財富顧問基礎課程 *	Structured Activity	Yes	No	10	20 Jun 2020 - 19 Jun 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: IFAs and Brokers	Mr Sky Iu 2625 6334
80/10/41	FTLife Insurance Company Limited	明日之星同學會培訓課程系列一 Future Star Club Training Series 1 *	Structured Activity	Yes	No	9	16 Jul 2020 - 15 Jul 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: IFAs and Brokers	Mr Sky Iu 2625 6334
80/10/42	FTLife Insurance Company Limited	FOCUS: Target Recruitment Workshop 定焦攻略: 目標市場招募法 *	Structured Activity	Yes	No	6	2 Sep 2020 - 1 Sep 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: IFAs and Brokers	Miss Vienna Kan 2625 6327
80/10/43	FTLife Insurance Company Limited	FTLife Leadership and Agency Management Essentials 201 富通領袖培育及團隊管理課程201 *	Structured Activity	Yes	No	12	2 Sep 2020 - 1 Sep 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: IFAs and Brokers	Miss Gorly Ha 2625 6303

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80/10/44	FTLife Insurance Company Limited	Future Star Club Training Series II 明日之星同學會培訓課程系列二 *	Structured Activity	Yes	No	18	2 Oct 2020 - 1 Oct 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: IFAs and Brokers	Mr Sky Iu 2625 6334
80/10/45 Renewed	FTLife Insurance Company Limited	Knowledge of Life Operations 壽險營運攻略 *	Structured Activity	Yes	No	7	16 Mar 2021 - 15 Mar 2022	In-house 內部員工 + Commissioning Body 委託機構員工 + IFA and Brokers	Miss Astor LAU 26256332
80/10/46	FTLife Insurance Company Limited	Medical and CI Knowledge Booster 危疾醫療多面睇 *	Structured Activity	Yes	No	6	24 Apr 2020 - 23 Apr 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: IFA and Brokers	Miss Astor Lau 2625 6332
80/10/47	FTLife Insurance Company Limited	Essential Management Skills Program 營管理技巧工作坊 *	Structured Activity	Yes	No	8	1 Jul 2020 - 30 Jun 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers and IFAs	Miss Gorly Ha 2625 6303
80/10/48	FTLife Insurance Company Limited	周年法規培訓課程 Annual Compliance Training	Structured Activity	Yes	No	2	13 Jul 2020 - 12 Jul 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers and IFAs	Mr Steve Yu 2625 6321
80/10/49	FTLife Insurance Company Limited	FTLife Leadership Essentials Program 富通領袖發展課程 *	Structured Activity	Yes	No	8	2 Nov 2020 - 1 Nov 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: IFAs and Brokers	Miss Gorly Ha 2625 6303

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80/10/50	FTLife Insurance Company Limited	FTLife Compliance Training Series 富通合規培訓系列 *	Structured Activity	Yes	No	6	04 Jan 2021 - 03 Jan 2022	In-house 內部員工 + Commissioning Body 委託機構員工 + IFAs and Brokers	Mr Steve YU 2625 6321
80/10/52 New	FTLife Insurance Company Limited	Financial Planner Professional Training Series 專業財策顧問培訓系列 *	Structured Activity	Yes	No	13	22 Mar 2021 - 21 Mar 2022	In-house 內部員工 + Commissioning Body 委託機構員工 + Other: IFAs and Brokers	Mr Henry HSU 26256383
80/10/53 New	FTLife Insurance Company Limited	Medical and Critical Illness Knowledge Booster 危疾醫療多面睇 *	Structured Activity	Yes	No	8	24 May 2021 - 23 May 2022	In-house 內部員工 + Commissioning Body 委託機構員工 + Other: IFAs and Brokers	Miss Astor LAU 26256332
80/10/51	FTLife Insurance Company Limited	LEAP Leader Training Program 「富通企業家發展平台」- 經理培訓 *	Structured Activity	Yes	No	12	20 Jan 2021 - 19 Jan 2022	In-house 內部員工 + Others: IFAs and Brokers	Miss Vienna KAN 26256327
80/11/09 Renewed	Sun Life Hong Kong Limited	Compliance Workshop *	Structured Activity	Yes	No	5	01 May 2021 - 30 Apr 2022	In-house 內部員工 + Others: Members of Agency Channel & Partnership Distribution Channel	Miss Wing Yin Flora CHEUNG 31832576
80/11/15	Sun Life Hong Kong Limited	Practical Investment Training Series 投資實務研習坊 *	Structured Activity	Yes	No	6	21 May 2020 - 20 May 2021	In-house 內部員工 + Others: Members of Agency Channel & Partnership Distribution Channel	Miss Cheung Wing Yin Flora 3183 2576
80/11/16	Sun Life Hong Kong Limited	Retirement and Estate Planning Workshop	Structured Activity	Yes	No	3	11 Jun 2020 - 10 Jun 2021	In-house 內部員工 + Others: All distribution channel members such as agents and brokers	Miss Cheung Wing Yin Flora 3183 2576
80/11/17	Sun Life Hong Kong Limited	Getting Referral Workshop - Sales	Structured Activity	Yes	No	3	16 Jul 2020 - 15 Jul 2021	In-house 內部員工 + Others: Members of Agency Channel & Partnership Distribution Channel	Miss Cheung Wing Yin Flora 3183 2576

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80/11/18	Sun Life Hong Kong Limited	Workshop for Employer Scheme Selling 僱主計劃銷售培訓	Structured Activity	Yes	No	2	17 Aug 2020 - 16 Aug 2021	In-house 內部員工 + Others: Business Partners	Miss Cheung Wing Yin Flora 3183 2576
80/11/20	Sun Life Hong Kong Limited	Risk Management Workshop 管'你'風險工作坊	Structured Activity	Yes	No	3	8 Mar 2021 - 7 Mar 2022	In-house 內部員工 + Others: Members of Agency Channel & Partnership Distribution Channel	Miss Cheung Wing Yin Flora 31832576
80/11/21	Sun Life Hong Kong Limited	Cross Selling Sales Workshop	Structured Activity	Yes	No	3	1 Apr 2021 - 31 Mar 2022	In-house 內部員工 + Others: Members of Agency Channel & Partnership Distribution Channel	Miss Cheung Wing Yin Flora 31832576
80/11/22 Renewed	Sun Life Hong Kong Limited	Investment Linked Sales Workshop	Structured Activity	Yes	No	3	18 Apr 2021 - 17 Apr 2022	In-house 內部員工 + Others: Members of Agency Channel & Partnership Distribution Channel	Miss CHEUNG Wing Yin Flora 31832576
80/11/23	Sun Life Hong Kong Limited	Recruiting BGA Skills Workshop	Structured Activity	Yes	No	3	1 Oct 2020 - 30 Sep 2021	In-house 內部員工 + Others: Members of Agency Channel & Partnership Distribution Channel	Miss Cheung Wing Yin Flora 3183 2576
80/11/24	Sun Life Hong Kong Limited	Target Saving Selling Workshop	Structured Activity	Yes	No	3	1 Nov 2020 - 31 Oct 2021	In-house 內部員工 + Others: Members of Agency Channel & Partnership Distribution	Miss Cheung Wing Yin Flora 3183 2576
80/11/25	Sun Life Hong Kong Limited	Fact and Feeling Finding Workshop 搵出勝券工作坊	Structured Activity	Yes	No	3	14 Apr 2021 - 13 Apr 2022	In-house 內部員工 + Others: Members of Agency Channel & Partnership Distribution Channel	Miss Cheung Wing Yin Flora 31832576
80/11/26	Sun Life Hong Kong Limited	Health Series 全保抗病系列 *	Structured Activity	Yes	No	8	1 Aug 2020 - 31 Jul 2021	In-house 內部員工 + Others: Business partners	Miss Cheung Wing Yin Flora 3183 2576

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80/11/27	Sun Life Hong Kong Limited	Group Life and Medical Insurance Seminar 團體人壽及醫療保障講座	Structured Activity	Yes	No	2	24 Aug 2020 - 23 Aug 2021	In-house 內部員工 + Others: Distribution Channel Members including Agency members and Brokers	Miss Cheung Wing Yin Flora 3183 2576
80/11/28	Sun Life Hong Kong Limited	MPF Core CPD 2020 seminar 強積金核心學分講座2020	Structured Activity	No	Yes	2	7 Sep 2020 - 6 Sep 2021	In-house 內部員工 + Others: Distribution Channel Members	Miss Cheung Wing Yin Flora 3183 2576
80/11/29	Sun Life Hong Kong Limited	Intermediaries Compliance Workshop (E-Learning) 中介人監管守則專題研習坊 (電子學習)*	E-learning Activity	N/A	Yes	1	20 Jan 2021 - 19 Jan 2022	In-house 內部員工 + Others: Agency and Brokers (business)	Miss Wing Yin Flora CHEUNG 31832576
80/11/30	Sun Life Hong Kong Limited	Medical(Health) Series 醫生講授系列 *	Structured Activity	Yes	No	4	1 Mar 2021 - 28 Feb 2022	In-house 內部員工	Miss Cheung Wing Yin Flora 31832576
80/15/22	The Hong Kong and Shanghai Banking Corporation Limited	HK Investment Knowledge & Drilling *	Structured Activity	No	No	8	1 Jul 2020 - 30 Jun 2021	In-house 內部員工	Mr Fan Kwok Wai William 2288 4240
80/15/52	The Hong Kong and Shanghai Banking Corporation Limited	Risk Management and FCC	Structured Activity	Yes	No	3	1 Jan 2021 - 31 Dec 2021	In-house 內部員工	Ms Jasmine LAM 22884349
80/15/69	The Hong Kong and Shanghai Banking Corporation Limited	Sales Quality Updates and Review 2021	Structured Activity	Yes	No	3	1 Jan 2021 - 31 Dec 2021	In-house 內部員工	Ms Jasmine LAM 22884349
80/15/71	The Hong Kong and Shanghai Banking Corporation Limited	Ethics and Code of Conduct	Structured Activity	Yes	Yes	3	12 Jan 2021 - 11 Jan 2022	In-house 內部員工	Ms Jasmine LAM 22884349
80/15/72	The Hong Kong and Shanghai Banking Corporation Limited	Putting Customer First	Structured Activity	Yes	No	4	12 Jan 2021 - 11 Jan 2022	In-house 內部員工	Ms Jasmine LAM 22884349
80/17/15 Renewed	Manulife (International) Limited	Financial Planning Development Program (FPDP): Module 4 – Comprehensive Financial Planning	Structured Activity	No	No	10	01 Apr 2021 - 31 Mar 2022	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Mandy KWOK 29193425
80/17/22	Manulife (International) Limited	MOA Initial Training Course *	Structured Activity	No	No	35	1 Dec 2020 - 30 Nov 2021	Others: Contracted Insurance Advisors	Miss S Y Mandy Kwok 2919 3425

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80/17/23	Manulife (International) Limited	An Understanding of the ECA Legislation, Enhanced Regulation and Conduct Requirements of MPF Intermediaries	Structured Activity	No	No	3	1 Aug 2020 - 31 Jul 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Terence Tam 2510 5684
80/17/25	Manulife (International) Limited	Investment-Linked Long Term Insurance Examination Preparation Course *	Structured Activity	No	No	10	1 Aug 2020 - 31 Jul 2021	In-house 內部員工	Ms Mandy Kwok 2919 3425
80/17/32	Manulife (International) Limited	MOA Development Course 經理發展課程 *	Structured Activity	No	No	24	1 Jan 2021 - 31 Dec 2021	Others: Contracted insurance advisors	Ms Mandy Kwok 29193425
80/17/38	Manulife (International) Limited	MX90 days Sustain Program – Session 4 Importance of health insurance MX90 days Sustain Program – 課堂節數 – 4 健康保障的重要	Structured Activity	No	No	2	1 Jul 2020 - 30 Jun 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Agents	Ms Mandy Kwok 2919 3425
80/17/39	Manulife (International) Limited	Conduct Issues and Updates of the MPF System for MPF Intermediaries 強積金中介人操守及強積金制度發展	Structured Activity	No	No	2	1 Mar 2021 - 28 Feb 2022	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Contracted Agents	Mr Terence TAM 25105684
80/17/40	Manulife (International) Limited	Regulation and Conduct Requirements for MPF Intermediaries 強積金中介人 - 規管及操守要求	Structured Activity	No	Yes	2	1 Mar 2021 - 28 Feb 2022	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Contracted Agents	Mr Terence TAM 25105684
80/20/07	Convoy Global Holdings Limited	強積金中介人考試精讀班	Structured Activity	No	No	6	20 May 2020 - 19 May 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Miss Yuk Yu, Metis CHEUNG 36012338

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80/20/11	Convoy Global Holdings Limited	Preparatory Training for Licensing Examination for Securities and Futures Intermediaries - Fundamentals of Securities and Futures Regulation 證券及期貨從業員資格考試研習班(試卷一：基本證券及期貨規則)*	Structured Activity	No	No	8	15 Apr 2020 - 14 Apr 2021	In-house 內部員工	Mr Pui Lam, Kelvin YEUNG 36016750
80/20/12	Convoy Global Holdings Limited	Preparatory Training for Licensing Examination for Securities and Futures Intermediaries - Financial Market 證券及期貨從業員資格考試研習班(試卷十：金融市場)*	Structured Activity	No	No	8	25 Apr 2020 - 24 Apr 2021	In-house 內部員工	Mr Pui Lam, Kelvin YEUNG 36016750
80/20/13	Convoy Global Holdings Limited	Preparatory Training for Licensing Examination for Securities and Futures Intermediaries - Securities 證券及期貨從業員資格考試研習班試卷八：證券>*	Structured Activity	No	No	8	25 Apr 2020 - 24 Apr 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Pui Lam, Kelvin YEUNG 36016750
80/20/22 Renewed	Convoy Global Holdings Limited	MPF Training: Default Investment Strategy (DIS) Training for MPF Intermediaries 強積金指定課程「強積金預設投資策略」	Structured Activity	Yes	No	2	01 Apr 2021 - 31 Mar 2022	In-house 內部員工	Miss Yuk Yu, Metis CHEUNG 36012338
80/20/29 Renewed	Convoy Global Holdings Limited	MPF Training for Licensees - Development of MPF & Conduct of MPF Intermediaries 強積金制度發展及強積金中介人操守	Structured Activity	Yes	No	3	27 Mar 2021 - 26 Mar 2022	In-house 內部員工 + Commissioning Body 委託機構員工	Miss CHEUNG Yuk Yu, Metis 36012338
80/20/30 Renewed	Convoy Global Holdings Limited	Tax Deductible Voluntary Contributions (TVCs) for MPF Intermediaries 「可扣稅自願性供款」強積金中介人培訓	Structured Activity	Yes	No	2	01 Jun 2021 - 31 May 2022	In-house 內部員工	Miss CHEUNG Yuk Yu, Metis 36012338
80/20/32 Renewed	Convoy Global Holdings Limited	Basic Portfolio Management Strategies 組合管理策略基礎	Structured Activity	Yes	No	3	01 Apr 2021 - 31 Mar 2022	In-house 內部員工	Mr YEUNG Long Keen, Chris 36012234
80/20/33 Renewed	Convoy Global Holdings Limited	Fixed Income Investment 定息投資	Structured Activity	Yes	No	3	30 Apr 2021 - 29 Apr 2022	In-house 內部員工	Mr YEUNG Long Keen, Chris 36012234
80/20/34 Renewed	Convoy Global Holdings Limited	Equity Investing 股本投資	Structured Activity	Yes	No	3	30 Apr 2021 - 29 Apr 2022	In-house 內部員工	Mr YEUNG Long Keen, Chris 36012234
80/20/35 Renewed	Convoy Global Holdings Limited	Life Stages Consultative Selling 人生階段顧問式銷售	Structured Activity	Yes	No	3	30 Apr 2021 - 29 Apr 2022	In-house 內部員工	Mr YEUNG Long Keen, Chris 36012234

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80/20/36 Renewed	Convoy Global Holdings Limited	Derivative Investment 衍生工具投資	Structured Activity	Yes	No	3	30 Apr 2021 - 29 Apr 2022	In-house 內部員工	Mr YEUNG Long Keen, Chris 36012234
80/20/37	Convoy Global Holdings Limited	Fast Start Training- Foundation to Professional Consultant 新管理財顧問培訓課程- 專業理財顧問基礎篇	Structured Activity	Yes	No	8	14 Sep 2020 - 13 Sep 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Yeung Long Keen, Chris 3601 2234
80/20/38	Convoy Global Holdings Limited	Financial Crime Risk Management 金融犯罪風險管理	E-learning Activity	N/A	No	2	24 Dec 2020 - 23 Dec 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Miss Cheung Yuk Yu, Metis 36012338
80/20/39 New	Convoy Global Holdings Limited	Intensive Course: Licensing Examination for Securities and Futures Intermediaries Fundamentals of Securities and Futures Regulation 精讀班: 證券及期貨從業員資格考試〈試卷一: 基本證券及期貨規則〉	Structured Activity	Yes	No	4	26 Apr 2021 - 25 Apr 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Miss CHEUNG Yuk Yu, Metis 36012338
80/20/40 New	Convoy Global Holdings Limited	Mandatory Provident Fund (MPF) Schemes Examination Intensive Course 強制性公積金計劃考試精讀班	Structured Activity	Yes	No	3	16 Apr 2021 - 17 Apr 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Miss CHEUNG Yuk Yu, Metis 36012338
80/20/41 New	Convoy Global Holdings Limited	Intensive Course: Licensing Examination for Securities and Futures Intermediaries Financial Market 精讀班: 證券及期貨從業員資格考試〈試卷七: 金融市場〉	Structured Activity	Yes	No	4	26 May 2021 - 25 May 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Miss CHEUNG Yuk Yu, Metis 36012338
80/20/42 New	Convoy Global Holdings Limited	Intensive Course: Licensing Examination for Securities and Futures Intermediaries Securities 精讀班: 證券及期貨從業員資格考試〈試卷八: 證券〉	Structured Activity	Yes	No	4	22 Jun 2021 - 21 Jun 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Miss CHEUNG Yuk Yu, Metis 36012338
80/23/29	Sun Life Hong Kong Limited (for keeping former records of Sun Life Financial (Hong Kong) Limited)	Selection & Retention	Structured Activity	Yes	No	3	14 Feb 2021 - 13 Feb 2022	In-house 內部員工 + Others: Members of	Miss Cheung Wing Yin Flora 31832576

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80/24/61	Institute for Entrepreneurship (IFE), The Hong Kong Polytechnic University	eLearning 2020 Market Updates for Financial Practitioners *	E-learning Activity	N/A	No	8	12 Jun 2020 - 11 Jun 2021	Public 公眾人士	Mrs Wong Karen Kirby 3400 2763
80/24/62	Institute for Entrepreneurship (IFE), The Hong Kong Polytechnic University	eLearning 2020 Market Updates for Insurance Professional *	E-learning Activity	N/A	No	8	20 Jul 2020 - 19 Jul 2021	Public 公眾人士	Mrs Wong Karen Kirby 3400 2763
80/24/63	Institute for Entrepreneurship (IFE), The Hong Kong Polytechnic University	Wealth Management for High-Net-Worth Market (1) 高淨值客戶行政財富管理(一) *	Structured Activity	Yes	No	12	23 Jan 2021 - 22 Jan 2022	In-house 內部員工 + Public 公眾人士	Mrs Karen KIRBY WONG 34002763
80/24/64 New	Institute for Entrepreneurship (IFE), The Hong Kong Polytechnic University	eLearning CPD Finance Courses (2021-PJI) *	E-learning Activity	N/A	No	8	10 Mar 2021 - 09 Mar 2022	In-house 內部員工 + Public 公眾人士	Mrs WONG Karen KIRBY 34002763
80/24/65 New	Institute for Entrepreneurship (IFE), The Hong Kong Polytechnic University	Market Updates for Financial Practitioners (2021-F-PJI) *	Structured Activity	Yes	No	10	05 Apr 2021 - 04 Apr 2022	In-house 內部員工 + Public 公眾人士	Mrs WONG Karen KIRBY 34002763
80/28/03	BUPA (Asia) Ltd	Building a High Performance Team Series 建立高績效團隊系列 *	Structured Activity	Yes	No	9	31 Jan 2021 - 30 Jan 2022	In-house 內部員工	Mr Tannoy TO 2517 5082
80/28/05	BUPA (Asia) Ltd	Culture-in-Action Series *	Structured Activity	Yes	No	9	03 Dec 2020 - 02 Dec 2021	In-house 內部員工	Mr Tannoy TO 2517 5082
80/28/06	BUPA (Asia) Ltd	Business Ethics Series *	Structured Activity	Yes	Yes	6	4 Sep 2020 - 3 Sep 2021	In-house 內部員工	Mr Tannoy To 2517 5082
80/28/07	BUPA (Asia) Ltd	Information Security and Business Ethics Series *	E-learning Activity	N/A	Yes	2	11 Jan 2021 - 10 Jan 2022	In-house 內部員工	Mr Tannoy TO 2517 5082
80/29/20 Renewed	AXA China Region Insurance Company Limited	100 whys workshop 100個保險為什麼- 實戰工作坊 *	Structured Activity	Yes	No	9	25 Mar 2021 - 24 Mar 2022	In-house 內部員工	Mr Jacky FU 35863206
80/29/17	AXA China Region Insurance Company Limited	Goal Setting	Structured Activity	Yes	No	3	10 Feb 2021 - 09 Feb 2022	In-house 內部員工	Ms Jenny HUI 35863206
80/29/18	AXA China Region Insurance Company Limited	New Leader Fundamental Program *	Structured Activity	Yes	No	7	10 Feb 2021 - 09 Feb 2022	In-house 內部員工	Mr Gavin LO 35863207

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80/29/19	AXA China Region Insurance Company Limited	Team Development Support	Structured Activity	Yes	No	2	10 Feb 2021 - 09 Feb 2022	In-house 內部員工	Ms Michelle WU 35863216
80/29/20	AXA China Region Insurance Company Limited	100 whys workshop 100個保險為什麼- 實戰工作坊 *	Structured Activity	Yes	No	9	9 Mar 2020 - 8 Mar 2021	In-house 內部員工	Mr Jacky Fu 3586 3206
80/29/21	AXA China Region Insurance Company Limited	Selling Cycle Training Series 銷售循環全面聯系列 *	Structured Activity	No	No	12	15 Jun 2020 - 14 Jun 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Peggy Lee 3586 3224
80/29/22	AXA China Region Insurance Company Limited	Selling Skills Enhancement (SSE) Series 銷售實戰攻防系列 *	Structured Activity	No	No	12	18 Jun 2020 - 17 Jun 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Peggy Lee 3586 3224
80/29/23	AXA China Region Insurance Company Limited	Customer Experience Excellence Training for Insurance Contact Center 保險客戶聯絡中心卓越客戶體驗培訓 *	Structured Activity	No	No	11	4 Jul 2020 - 3 Jul 2021	In-house 內部員工	Ms Jackie Ng 2894 4031
80/29/24	AXA China Region Insurance Company Limited	Managers Competency Training Level 2	Structured Activity	Yes	No	3	12 Aug 2020 - 11 Aug 2021	In-house 內部員工	Ms Michelle Wu 3586 3216
80/29/25	AXA China Region Insurance Company Limited	Successful factors for Insurance Case Management 保險個案管理的成功要素 *	Structured Activity	No	No	9	28 Jul 2020 - 27 Jul 2021	In-house 內部員工	Ms Jackie Ng 2894 4031
80/29/26	AXA China Region Insurance Company Limited	Effective Business Coaching	Structured Activity	No	No	3	10 Feb 2021 - 9 Feb 2022	In-house 內部員工	Ms Michelle WU 35863216
80/29/27	AXA China Region Insurance Company Limited	Policy Administration and Customer Service 保單行政與售後服務	Structured Activity	Yes	No	5.5	19 Mar 2021 - 18 Mar 2022	In-house 內部員工	Mr Brian Lui 35863227
80/31/77	Prudential Hong Kong Limited	金錢的創造力	Structured Activity	No	No	2	26 Jun 2020 - 25 Jun 2021	In-house 內部員工	Mrs Carrie Lee 2977 8372
80/31/79	Prudential Hong Kong Limited	Agency Division Management Course 組織營業團隊管理課程 *	Structured Activity	No	No	9	25 Apr 2020 - 24 Apr 2021	In-house 內部員工	Miss Bonnie Pang 2977 4902
80/31/80	Prudential Hong Kong Limited	To be an Effective Manager Series 成為有效經理的系列 *	Structured Activity	No	No	15	18 May 2020 - 21 Jul 2021	In-house 內部員工	Miss Bonnie Pang 2977 4902

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		成為高效能經理系列*		No		12	22 Jul 2020 - 17 May 2021	內部員工	2977 4902
80/31/91	Prudential Hong Kong Limited	Voluntary Health Insurance Scheme (VHIS), Get Set, Go 自願醫保計劃贏在起跑線	Structured Activity	No	No	2	28 Jul 2020 - 27 Jul 2021	In-house 內部員工	Mrs Carrie Lee 2977 8372
80/31/93	Prudential Hong Kong Limited	Code of Conduct for Licensed Insurance Agents 持牌保險代理人操守守則	Structured Activity	Yes	No	2	5 Jan 2021 - 4 Jan 2022	In-house 內部員工	Ms Winnie HO 2977 3667
80/31/97	Prudential Hong Kong Limited	Hot Product Sales Training Series 熱賣產品銷售系列*	Structured Activity	Yes	No	6	6 Apr 2020 - 5 Apr 2021	In-house 內部員工	Mr Marcus Liu 2977 3447
80/31/98	Prudential Hong Kong Limited	Selling Skill Series 銷售技巧系列*	Structured Activity	No	No	8	8 Jul 2020 - 7 Jul 2021	In-house 內部員工	Mr Hui Ho Lun 2977 4919
80/31/99	Prudential Hong Kong Limited	Advanced Sales Training Series 進階銷售發展系列*	E-learning Activity	N/A	No	2	10 Aug 2020 - 9 Aug 2021	In-house 內部員工	Mr Marcus Liu 2977 3447
80/31/100	Prudential Hong Kong Limited	IA Codes and Guideline for Licensed Insurance Agents (E-learning) 持牌保險代理人操守守則及保監局指 引(網上培訓)*	E-learning Activity	N/A	Yes	3	20 Aug 2020 - 19 Aug 2021	In-house 內部員工	Ms Winnie Ho 2977 3667
80/31/101	Prudential Hong Kong Limited	Agency Management Online Training Series - Future-ready Leaders Development 經理網上培訓系列 - 未來團隊領袖課程*	E-learning Activity	N/A	No	2	12 Aug 2020 - 11 Aug 2021	In-house 內部員工	Miss Bonnie Pang 2977 4902
80/31/102	Prudential Hong Kong Limited	IIQE Preparatory Class – Paper 5 保險中介人資格考試預備班 – 卷五 *	Structured Activity	Yes	No	12	6 Aug 2020 - 5 Aug 2021	In-house 內部員工	Mr Marcus Liu 2977 3447
80/31/103	Prudential Hong Kong Limited	IIQE Preparatory Class – MPF 保險中介人資格考試預備班 – 強積金*	Structured Activity	Yes	No	6	7 Aug 2020 - 6 Aug 2021	In-house 內部員工	Mr Marcus Liu 2977 3447

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80/31/104	Prudential Hong Kong Limited	IIQE Preparatory Class – Paper 2 保險中介人資格考試預備班 – 卷二 *	Structured Activity	Yes	No	8	7 Aug 2020 - 6 Aug 2021	In-house 內部員工	Mr Marcus Liu 2977 3447
80/31/105	Prudential Hong Kong Limited	Professional Indemnity Insurance for Insurance Agents 保險代理人專業責任保險	Structured Activity	Yes	No	2	10 Aug 2020 - 09 Aug 2021	In-house 內部員工	Ms Winnie Ho 2977 3667
80/31/106	Prudential Hong Kong Limited	Practical Sales Skills Series One 實戰銷售技巧系列一 *	Structured Activity	Yes	No	8	7 Sep 2020 - 6 Sep 2021	In-house 內部員工	Mr Ricky Li 2977 8342
80/31/107	Prudential Hong Kong Limited	Agency Management Series 營業團隊管理系列 *	Structured Activity	No	No	6	24 Aug 2020 - 23 Aug 2021	In-house 內部員工	Miss Bonnie Pang 2977 4902
80/31/108	Prudential Hong Kong Limited	Practical Sales Skills Series Two 實戰銷售技巧系列二 *	Structured Activity	Yes	No	8	27 Oct 2020 - 26 Oct 2021	In-house 內部員工	Mr Ricky Li 2977 8342
80/31/109	Prudential Hong Kong Limited	Practical Sales Skills Series Three 實戰銷售技巧系列三 *	Structured Activity	Yes	No	8	27 Oct 2020 - 26 Oct 2021	In-house 內部員工	Mr Ricky Li 2977 8342
80/31/110	Prudential Hong Kong Limited	Practical Sales Skills Series Four 實戰銷售技巧系列四 *	Structured Activity	Yes	No	8	27 Oct 2020 - 26 Oct 2021	In-house 內部員工	Mr Ricky Li 2977 8342
80/31/111	Prudential Hong Kong Limited	GUIDELINE ON FINANCIAL NEEDS ANALYSIS (GL30) 財務需要分析指引(指引30)	Structured Activity	Yes	No	2	18 Jan 2021 - 17 Jan 2022	In-house 內部員工	Ms Winnie HO 2977 3667
80/31/112	Prudential Hong Kong Limited	Code of Conduct For Licensed Insurance Agents 持牌保險代理人操守守則 *	Structured Activity	Yes	Yes	6	18 Jan 2021 - 17 Jan 2022	In-house 內部員工	Ms Winnie HO 2977 3667
80/31/113	Prudential Hong Kong Limited	Practical Sales Skills Series Five 實戰銷售技巧系列五 *	Structured Activity	Yes	No	8	1 Feb 2021 - 31 Jan 2022	In-house 內部員工	Mr Ricky LI 2977-8342
80/31/114	Prudential Hong Kong Limited	Practical Sales Skills Series Six 實戰銷售技巧系列六 *	Structured Activity	No	No	8	26 Feb 2021 - 25 Mar 2022	In-house 內部員工	Mr Ricky Li 2977-8342

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80/33/62	Aon Hong Kong Ltd	Personal Effectiveness Series Plus for Insurance Professionals II *	Structured Activity	No	No	12.5	1 May 2020 - 30 Apr 2021	In-house 內部員工	Ms Anne Lau 2861 6519
80/33/63	Aon Hong Kong Ltd	Mental Health for Insurance Professionals *	Structured Activity	No	No	6	1 May 2020 - 30 Apr 2021	In-house 內部員工	Ms Anne Lau 2861 6519
80/33/64 New	Aon Hong Kong Ltd	Inspirational Leader for Insurance Professionals *	Structured Activity	Yes	No	8.5	26 Mar 2021 - 25 Mar 2022	In-house 內部員工	Ms Anne LAU 28616519
80/33/65 New	Aon Hong Kong Ltd	Client Promise for Insurance Professionals II *	Structured Activity	Yes	No	15	26 Mar 2021 - 25 Mar 2022	In-house 內部員工	Ms Anne LAU 28616519
80/37/02	Standard Academy of Insurance & Management Ltd	Employee Compensation Ordinance *	Structured Activity	Yes	No	5	1 Sep 2020 - 31 Aug 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
80/37/03	Standard Academy of Insurance & Management Ltd	Abstracts of Insurance Related Ordinances and Guidance Note - Brief Summary *	Structured Activity	No	No	5	1 Sep 2020 - 31 Aug 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
80/37/04	Standard Academy of Insurance & Management Ltd	28 Insurance Traps an insurance intermediary has to know *	Structured Activity	No	No	5	1 Aug 2020 - 31 Jul 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
80/37/05	Standard Academy of Insurance & Management Ltd	Management Skills Enhancement Series No. 1 - Sales Management - Motivation and Communication *	Structured Activity	Yes	No	10	1 Aug 2020 - 31 Jul 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
80/37/06	Standard Academy of Insurance & Management Ltd	Sale Made Simple - Popular Insurance Series No. 1 *	Structured Activity	Yes	No	10	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350

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80/37/07	Standard Academy of Insurance & Management Ltd	Sale Made Easy Series *	Structured Activity	No	No	20	1 Dec 2020 - 30 Nov 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
80/37/08	Standard Academy of Insurance & Management Ltd	Management Series No. 2 *	Structured Activity	Yes	No	20	1 Aug 2020 - 31 Jul 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
80/37/09	Standard Academy of Insurance & Management Ltd	Career and Job Management Series *	Structured Activity	Yes	No	15	01 Feb 2021 - 31 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
80/37/10 Renewed	Standard Academy of Insurance & Management Ltd	Review of Law and Practice of MPF and Most updated Court Interpretation of Compulsory Motor Ordinance and Policy Wording *	Structured Activity	Yes	No	7	01 May 2021 - 30 Apr 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond CHOW 25236350
80/37/11 Renewed	Standard Academy of Insurance & Management Ltd	32 Actual Insurance Claims Complaint an Insurance Intermediary cannot Miss or Ignore *	Structured Activity	Yes	No	5	01 May 2021 - 30 Apr 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond CHOW 25236350
80/37/12 Renewed	Standard Academy of Insurance & Management Ltd	Business Interruption Insurance, Fidelity Guarantee and Surety Bond *	Structured Activity	Yes	No	5	01 May 2021 - 30 Apr 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond CHOW 25236350
80/37/14	Standard Academy of Insurance & Management Ltd	Corporate and Personal Branding Management in Insurance Industry *	Structured Activity	Yes	No	5	1 Apr 2021 - 31 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 25236350
80/37/16	Standard Academy of Insurance & Management Ltd	80 Insurance Clauses and Warranties an Insurance Intermediary has to understand *	Structured Activity	Yes	No	5	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
80/37/17	Standard Academy of Insurance & Management Ltd	Staff, career and grief counselling for employees' assistance, motivation and enhancement of customers' services *	Structured Activity	Yes	No	8	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350

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80/37/18	Standard Academy of Insurance & Management Ltd	Risk Management *	Structured Activity	Yes	No	5	1 Mar 2021 - 28 Feb 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond CHOW 25236350
80/37/19	Standard Academy of Insurance & Management Ltd	Top Twenty Management Models (Conceptual Tools) - Most Effective and Useful Shortcut Guide for Successful Managers *	Structured Activity	Yes	No	5	1 Sep 2020 - 31 Aug 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
80/37/20	Standard Academy of Insurance & Management Ltd	Effective Time Management for Insurance Intermediaries *	Structured Activity	Yes	No	5	1 Sep 2020 - 31 Aug 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
80/37/23	Standard Academy of Insurance & Management Ltd	Enhance Emotional Quotient (EQ) and Adversity Quotient (AQ) to Optimize our Insurance Career *	Structured Activity	Yes	No	5	1 Aug 2020 - 31 Jul 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
80/37/24	Standard Academy of Insurance & Management Ltd	Enhancing Self-confidence and Self-esteem to improve sales performance *	Structured Activity	Yes	No	5	01 Feb 2021 - 31 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
80/37/25	Standard Academy of Insurance & Management Ltd	Professional Level CPD Course - Most Updated Court Interpretation of Insurance Policy Contract Terms and Conditions (Part I) *	Structured Activity	Yes	No	5	1 Aug 2020 - 31 Jul 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350

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80/37/26	Standard Academy of Insurance & Management Ltd	Career Self-Management *	Structured Activity	Yes	No	5	1 Sep 2020 - 31 Aug 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
80/37/27	Standard Academy of Insurance & Management Ltd	Effective Leadership *	Structured Activity	Yes	No	5	1 Apr 2021 - 31 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 25236350
80/37/28	Standard Academy of Insurance & Management Ltd	Marine Insurance - Professional Level Series *	Structured Activity	Yes	No	15	1 Mar 2020 - 28 Feb 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond CHOW 25236350
80/37/29	Standard Academy of Insurance & Management Ltd	Professional Level CPD Course - Most Updated Statutes and Court Interpretation of Insurance Policy Contract Terms and Conditions (Part 3) - Liability Insurance *	Structured Activity	Yes	No	5	1 Apr 2021 - 31 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 25236350
80/37/30	Standard Academy of Insurance & Management Ltd	Professional Level CPD Course – Court of Final Appeal & Others – Leading Insurance Court Cases (Part 4 and Part 5) - Duty of Insurance Brokers and Agents, Motor, Property, Cargo and Liability Insurance *	Structured Activity	Yes	No	10	1 Mar 2021 - 28 Feb 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond CHOW 25236350
80/37/31	Standard Academy of Insurance & Management Ltd	Professional Level CPD Course – Court of Final Appeal & Others – Leading Insurance Court Cases (Part 6 and Part 7) - Employees Compensation Insurance and Complicated Issues of Sports and Tours Liability *	Structured Activity	Yes	No	10	1 Apr 2021 - 31 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 25236350

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80/38/22	The Chartered Insurance Institute Hong Kong Limited	Building Core Knowledge Seminar for Insurance Intermediaries *	Structured Activity	Yes	No	8	5 Feb 2021 - 4 Feb 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Sisi Laksono 25200098
80/38/23	The Chartered Insurance Institute Hong Kong Limited	Digital and Innovation Seminar for Insurance Intermediaries *	Structured Activity	Yes	No	10	17 Sep 2020 - 16 Sep 2021	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Sisi Laksono 2520 0098
80/38/24	The Chartered Insurance Institute Hong Kong Limited	Ethics and Regulation Seminar for Insurance Intermediaries *	Structured Activity	Yes	No	11	27 Jun 2020 - 26 Jun 2021	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Miss Ellen Ho 2115 3450

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80/38/25 Renewed	The Chartered Insurance Institute Hong Kong Limited	Legal and Risks CPD Seminar *	Structured Activity	Yes	No	14	22 Mar 2021 - 21 Mar 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Sisi LAKSONO 25200098
80/38/26	The Chartered Insurance Institute Hong Kong Limited	Fundamental of Insurance and Financial Services for Insurance Intermediaries *	E-learning Activity	N/A	No	8.5	4 Feb 2021 - 3 Feb 2022	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Sisi Laksono 25200098
80/40/04	Hong Kong Life Insurance Limited	Life Stages – Effective Insurance Selling Skills Workshop	Structured Activity	No	No	4	1 Aug 2020 - 31 Jul 2021	In-house 內部員工	Mr Roger Kwok 2290 2717
80/40/06	Hong Kong Life Insurance Limited	Life Operations - Underwriting & Policy Administration *	Structured Activity	No	No	5	1 Sep 2020 - 31 Aug 2021	In-house 內部員工	Mrs Hilary Ng 22902817
80/41/20 New	Institute of Professional Education and Knowledge (PEAK) of the VTC & General Agents and Managers Association of Hong Kong Limited (GAMAHK)	CPD Seminar 2021 *	Structured Activity	Yes	No	9	01 Apr 2021 - 31 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly TAM 28361822
80/45/06	The Hong Kong Federation of Trade Unions Occupational Retraining Centre	Foundation Certificate in Life Insurance and Related Legal Provisions (Part- time) 人壽保險相關法例 基礎證書(兼讀制)	Structured Activity	No	No	10	1 Jun 2020 - 31 May 2021	Public 公眾人士	Dr Wong Chi Mei 2715 6671
80/45/07	The Hong Kong Federation of Trade Unions Occupational Retraining Centre	Foundation Certificate in Commercial Insurance, Related Legal Provisions and Claims (Part-time) 商業保險相關法例及 索償基礎證書(兼讀制)	Structured Activity	Yes	No	10	1 Jun 2020 - 31 May 2021	Public 公眾人士	Dr Wong Chi Mei 2715 6671
80/45/08	The Hong Kong Federation of Trade Unions Occupational Retraining Centre	Foundation Certificate in Statutory Insurance and Claims (Motor) (Part-time) 強制性保險條例及索償(汽車) 基礎證書(兼讀制)	Structured Activity	Yes	No	10	1 Jun 2020 - 31 May 2021	Public 公眾人士	Dr Wong Chi Mei 2715 6671
80/45/09	The Hong Kong Federation of Trade Unions Occupational Retraining Centre	Foundation Certificate in Insurance Claims (Medical & Personal Accidents) (Part-time) 保險索償(醫療及個人意外) 基礎證書(兼讀制)	Structured Activity	Yes	No	11	1 Jun 2020 - 31 May 2021	Public 公眾人士	Dr Wong Chi Mei 2715 6671
80/45/10	The Hong Kong Federation of Trade Unions Occupational Retraining Centre	Foundation Certificate in China Insurance Laws (Part-time) 中國保險法基礎證書(兼讀制)	Structured Activity	No	No	11	1 Jun 2020 - 31 May 2021	Public 公眾人士	Dr Wong Chi Mei 2715 6671

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80/45/13	The Hong Kong Federation of Trade Unions Occupational Retraining Centre	Foundation Certificate in Effective Communication in Financial Counseling (Part-time) 財務諮詢有效溝通技巧基礎證書(兼讀制)	Structured Activity	No	No	10	1 Jun 2020 - 31 May 2021	Public 公眾人士	Dr Wong Chi Mei 2715 6671
80/45/16	The Hong Kong Federation of Trade Unions Occupational Retraining Centre	Foundation Certificate in Financial Planning (Mutual Funds and Equity) (Part-time) 財務策劃(基金和證券投資)基礎證書(兼讀制)	Structured Activity	No	No	10	1 Jun 2020 - 31 May 2021	Public 公眾人士	Dr Wong Chi Mei 2715 6671
80/45/23	The Hong Kong Federation of Trade Unions Occupational Retraining Centre	The Status Quo and Future Challenge of Hong Kong Bancassurance 香港銀行保險業現況及面對的挑戰	Structured Activity	Yes	No	10	24 Sep 2020 - 23 Sep 2021	Public 公眾人士	Dr Wong Chi Mei 2715 6671
80/45/24	The Hong Kong Federation of Trade Unions Occupational Retraining Centre	Insurance and electronic money 保險與電子幣	Structured Activity	Yes	No	5	1 Nov 2020 - 31 Oct 2021	Public 公眾人士	Dr Wong Chi Mei 2715 6671
80/45/25	The Hong Kong Federation of Trade Unions Occupational Retraining Centre	International Air Freight Cargo Insurance 國際航空貨運運輸保險	Structured Activity	No	No	5	1 Nov 2020 - 31 Oct 2021	Public 公眾人士	Dr Wong Chi Mei 2715 6671
80/45/26	The Hong Kong Federation of Trade Unions Occupational Retraining Centre	Foundation Certificate in Financial Planning (Retirement Planning II) (Part-time) 財務策劃(退休策劃 II)基礎證書(兼讀制)*	Structured Activity	Yes	No	10	23 Apr 2020 - 22 Apr 2021	Public 公眾人士	Dr Wong Chi Mei 2715 6671
80/45/27	The Hong Kong Federation of Trade Unions Occupational Retraining Centre	Foundation Certificate in Statutory Insurance and Claims (Employees' Compensation) (Part-time) 強制性保險條例及索償(僱員補償)基礎證書(兼讀制)	Structured Activity	Yes	No	10	23 Apr 2020 - 22 Apr 2021	Public 公眾人士	Dr Wong Chi Mei 2715 6671
80/45/28	The Hong Kong Federation of Trade Unions Occupational Retraining Centre	Foundation Certificate in the Most Recently Enacted Laws Related to Insurance (Part-time) 最新保險相關法例基礎證書(兼讀制)*	Structured Activity	Yes	No	10	23 Apr 2020 - 22 Apr 2021	Public 公眾人士	Dr Wong Chi Mei 2715 6671

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80/45/29	The Hong Kong Federation of Trade Unions Occupational Retraining Centre	Foundation Certificate in Code of Conduct for Insurers and Code of Practice for Insurance Intermediaries (Part-time) 承保人及保險中介人實務守則基礎證	Structured Activity	Yes	No	10	23 Apr 2020 - 22 Apr 2021	Public 公眾人士	Dr Wong Chi Mei 2715 6671
80/52/02	Quilter International Isle of Man Limited	Legal Aspects of Financial Planning in Hong Kong	Structured Activity	No	No	1	23 Nov 2020 - 22 Nov 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Craig So 35525898
80/52/03	Quilter International Isle of Man Limited	Essentials of Running a Financial Planning Practice *	Structured Activity	No	No	7.5	23 Nov 2020 - 22 Nov 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Craig So 35525898
80/52/05	Quilter International Isle of Man Limited	UK Inheritance Tax Planning through Use of Trusts	Structured Activity	No	No	2	23 Nov 2020 - 22 Nov 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Craig So 35525898
80/52/11	Quilter International Isle of Man Limited	Insurance Intermediaries Training Series - Financial Planning and Trust	Structured Activity	No	No	7	23 Nov 2020 - 22 Nov 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Craig So 35525898
80/59/19	The Life Underwriters Association of Hong Kong Limited	How do insurance intermediaries accommodate the new insurance supervision regulations by the Insurance Authority? 保監新法規下, 保險從業員如何適應?	Structured Activity	No	No	2	23 Apr 2020 - 22 Apr 2021	Others: Insurance Practitioners	Miss Shirley So 2969 0234

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80/59/20	The Life Underwriters Association of Hong Kong Limited	2020 CPD Seminar on Financial Knowledge For Insurance Practitioners in Hong Kong 2020 保險從業員之財務知識講座 *	Structured Activity	No	No	9	2 Jun 2020 - 1 Jun 2021	Others: Insurance Practitioners	Miss Zinnia Wong 2969 0206
80/59/21 New	The Life Underwriters Association of Hong Kong Limited	2021 CPD Seminar on Finance and Legal Knowledge For Insurance Practitioners in Hong Kong 2021 保險從業員之財務及法律知識講座 *	Structured Activity	Yes	No	12	21 Apr 2021 - 20 Apr 2022	Other: Insurance Practitioners	Miss Zinnia WONG 29690206
80/74/24	The Hong Kong Institute of Bankers	Banking Services and Professional Ethics *	Structured Activity	Yes	No	8	15 Aug 2020 - 14 Aug 2021	Public 公眾人士 + Commissioning Body 委託機構員工 + Others: Insurance Brokers	Ms Rita Yeung 2190 7060
80/74/26	The Hong Kong Institute of Bankers	Strive for Communication Excellence *	Structured Activity	Yes	No	24	14 Sep 2020 - 13 Sep 2021	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 + Others: Insurance Brokers	Ms Rita Yeung 2190 7060
80/74/28	The Hong Kong Institute of Bankers	Wealth Management for High Net-Worth Individuals (HNWIs) *	Structured Activity	Yes	No	24	2 Jul 2020 - 1 Jul 2021	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 + Others: Insurance Brokers	Ms Rita Yeung 2190 7060

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80/74/29	The Hong Kong Institute of Bankers	Certified Private Wealth Professionals (CPWP) Module 2 - Ethics and Compliance *	Structured Activity	Yes	No	12	1 Oct 2020 - 30 Sep 2021	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 + Others: Insurance Brokers	Ms Rita Yeung 2190 7060
80/74/31	The Hong Kong Institute of Bankers	Regulations, Data Privacy and Tools for Wealth Management *	Structured Activity	Yes	No	8	1 Jun 2020 - 31 May 2021	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 + Others: Insurance Brokers	Ms Rita Yeung 2190 7060
80/74/32	The Hong Kong Institute of Bankers	Legal & Regulatory Update *	Structured Activity	Yes	No	4	4 Feb 2021 - 3 Feb 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 + Others: Insurance Brokers	Mr Wallace Hui 21907088
80/74/33 Renewed	The Hong Kong Institute of Bankers	ECF - Retail Wealth Management (RWM) - Essentials of Banking *	Structured Activity	Yes	No	15	12 Mar 2021 - 11 Mar 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Henry LEE 2190 7028
80/74/34 Renewed	The Hong Kong Institute of Bankers	ECF - Retail Wealth Management (RWM) - Investment and Asset Management: Alternatives and Wealth Solutions *	Structured Activity	Yes	No	15	12 Mar 2021 - 11 Mar 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Henry LEE 2190 7028

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80/74/35 Renewed	The Hong Kong Institute of Bankers	ECF - Retail Wealth Management (RWM) - Investment and Asset Management: Product Solutions *	Structured Activity	Yes	No	15	12 Mar 2021 - 11 Mar 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Henry LEE 2190 7028
80/74/36 Renewed	The Hong Kong Institute of Bankers	ECF - Retail Wealth Management (RWM) - Financial Planning and Wealth Management *	Structured Activity	Yes	No	15	12 Mar 2021 - 11 Mar 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Henry LEE 2190 7028
80/74/37	The Hong Kong Institute of Bankers	Mainland China Cultural Environment & Global Wealth Management Planning 中國民生概覽與環球財富保障 *	Structured Activity	No	No	7	17 Apr 2020 - 16 Apr 2021	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 + Others: Insurance brokers	Ms Rita Yeung 2190 7060
80/78/12	Hong Kong Financial Services Professional Association Limited	Wealth Management for High-Net Worth (HNW) Clients 高淨客戶之財富管理 *	Structured Activity	Yes	No	10	1 Apr 2021 - 31 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Ricky Lee 21512618
80/78/13	Hong Kong Financial Services Professional Association Limited	Practices of Financial Planning 財務策劃實踐 *	Structured Activity	Yes	No	15	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Ricky Lee 2151 2618
80/78/14	Hong Kong Financial Services Professional Association Limited	Comprehensive insurance and medical insurance planning 全方位保險及醫保策劃 *	Structured Activity	Yes	No	14	1 Mar 2021 - 28 Feb 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Ricky Lee 21512618
80/78/15	Hong Kong Financial Services Professional Association Limited	Enhancing Wealth Management Skills with Market Analysis 分析市場以加強財務策劃能力 *	Structured Activity	Yes	No	21	1 Sep 2020 - 31 Aug 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Ricky Lee 2151 2618
80/78/16	Hong Kong Financial Services Professional Association Limited	Long-Term Wealth Management for Client 為客戶長遠規劃財富 *	Structured Activity	Yes	No	11	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Ricky Lee 21512618

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80/78/17	Hong Kong Financial Services Professional Association Limited	Enhancing Soft Skills I 提升軟性技巧 I *	Structured Activity	Yes	No	9	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Ricky Lee 21512618
80/78/18	Hong Kong Financial Services Professional Association Limited	Enhancing Soft Skills II 提升軟性技巧 II *	Structured Activity	Yes	No	12	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Ricky Lee 21512618
80/78/19 New	Hong Kong Financial Services Professional Association Limited	Regulations and compliance for insurance industry 保險業相關法規及條例 *	Structured Activity	Yes	Yes	8	01 Apr 2021 - 31 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Ricky LEE 21512618
80/92/02	Institute of Financial Planners of Hong Kong	Practices & Updates in Financial Planning I *	Structured Activity	Yes	No	51	1 Jul 2020 - 30 Jun 2021	Public 公眾人士	Mr Sam Kong 2982 7834
80/92/03 Renewed	Institute of Financial Planners of Hong Kong	Practices & Updates in Financial Planning II *	Structured Activity	No	No	34	01 Apr 2021 - 31 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Sam KONG 29827834
80/92/04	Institute of Financial Planners of Hong Kong	Practices & Updates in Financial Planning III - Investment and Risk Management Series *	Structured Activity	Yes	No	46	1 Feb 2021 - 31 Jan 2022	Public 公眾人士	Mr Sam Kong 29827834
80/92/05	Institute of Financial Planners of Hong Kong	Practices & Updates in Financial Planning IV *	Structured Activity	Yes	No	49	1 Feb 2021 - 31 Jan 2022	Public 公眾人士	Mr Sam Kong 29827834

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80/92/06	Institute of Financial Planners of Hong Kong	Practices and Updates in Financial Planning V *	Structured Activity	No	No	65	1 May 2020 - 30 Apr 2021	Public 公眾人士	Ms Kasia Cheung 2982 7861
80/92/07	Institute of Financial Planners of Hong Kong	Practices & Updates in Financial Planning VI *	Structured Activity	Yes	No	72	1 Sep 2020 - 31 Aug 2021	Public 公眾人士	Ms Kasia Cheung 2982 7861
80/92/08	Institute of Financial Planners of Hong Kong	Practices & Updates in Financial Planning VII *	Structured Activity	Yes	No	62	1 Nov 2020 - 31 Oct 2021	In-house 內部員工 + Public 公眾人士	Mr Sam Kong 2982 7834
80/92/10	Institute of Financial Planners of Hong Kong	Practices and Updates in Financial Planning IX *	Structured Activity	Yes	No	10	1 Oct 2020 - 30 Sep 2021	Public 公眾人士	Mr Sam Kong 2982 7834
80/101/20	Everbright Sun Hung Kai Company Limited	Insurance Training *	Structured Activity	No	No	10	19 Jun 2020 - 18 Jun 2021	In-house 內部員工	Mr Sun Cheuk Fung Roy 3920 1852
80/101/22	Everbright Sun Hung Kai Company Limited	Insurtech and Bayarea 保險科技與大灣區 *	Structured Activity	No	No	8	16 Sep 2020 - 15 Sep 2021	In-house 內部員工	Mr Sun Cheuk Fung Roy 3920 1852
80/101/25	Everbright Sun Hung Kai Company Limited	Anti-Money Laundering and Counter- Terrorist Financing Training	Structured Activity	No	Yes	2	5 Oct 2020 - 4 Oct 2021	In-house 內部員工	Mr Kevin Yau 3920 2432
80/109/07	MetLife Limited	Personal Branding for Insurance Specialist	Structured Activity	No	No	6	27 Feb 2020 - 26 Feb 2021	In-house 內部員工	Miss Ho Ka Wing 2199 1135
80/112/21	BOC Group Life Assurance Company Limited	Sales Cycle 銷售循環 *	Structured Activity	Yes	No	12	2 Mar 2021 - 1 Mar 2022	In-house 內部員工 + Others: 內部員工: 活動機構下的員工、保 險中介人、其負責人/行 政總裁	Mr Mak Kin Chung Ken 35569905

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80/112/22	BOC Group Life Assurance Company Limited	Professional Wealth Management Program 專業財富管理課程 *	Structured Activity	No	No	9	27 Feb 2020 - 26 Feb 2021	In-house 內部員工 + Others: 內部員工: 活動機構下的員工、保 險中介人、其負責人/行 政總裁	Mr Mak Kin Chung Ken 3556 9905
80/112/24	BOC Group Life Assurance Company Limited	Coaching-style Leadership Fundamentals 教練式領導力基礎 *	Structured Activity	Yes	No	8	4 Mar 2021 - 3 Mar 2022	In-house 內部員工 + Others: 內部員工: 活動機構下的員工、保 險中介人、其負責人/行 政總裁	Mr Mak Kin Chung Ken 35569905
80/112/25	BOC Group Life Assurance Company Limited	Wealth Management - Retirement Planning 財富管理 - 退休策劃	Structured Activity	Yes	No	2	28 Aug 2020 - 27 Aug 2021	In-house 內部員工 + Others: Use for partner channels	Mr Kent Wong 3556 9223
80/112/26	BOC Group Life Assurance Company Limited	Wealth Management -Legacy Planning 財富管理-財富傳承策劃	Structured Activity	Yes	No	2	31 Aug 2020 - 30 Aug 2021	In-house 內部員工 + Others: Partner banks/Brokers/Insuranc e Agents	Mr Kent Wong 3556 9223
80/112/27	BOC Group Life Assurance Company Limited	Managing Personal Financial Risk - Critical illness and Medical Insurance 個人財務風險管理-危疾與醫療保險	Structured Activity	Yes	No	2	4 Sep 2020 - 3 Sep 2021	In-house 內部員工 + Others: Partner banks/Brokers/Insuranc e Agents	Mr Kent Wong 3556 9223
80/112/28	BOC Group Life Assurance Company Limited	Managing Personal Financial Risk - Life Insurance 個人財務風險管理-人壽保險	Structured Activity	Yes	No	2	4 Sep 2020 - 3 Sep 2021	In-house 內部員工 + Others: Partner banks/Brokers/Insuranc e Agents	Mr Kent Wong 3556 9223

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80/112/29	BOC Group Life Assurance Company Limited	Compliance on insurance selling 保險銷售之合規	Structured Activity	Yes	Yes	2	9 Nov 2020 - 8 Nov 2021	In-house 內部員工 + Others: Use for partner channels	Mr Kent Wong 35569223
80/112/30	BOC Group Life Assurance Company Limited	Wealth Management - Education Fund Planning 財富管理-教育儲備規劃	Structured Activity	Yes	No	2	28 Dec 2020 - 27 Dec 2021	In-house 內部員工 + Others: partner banks/brokers/insurance agents	Mr Kent WONG 35569223
80/113/07	China CITIC Bank International Limited	Branch Service Excellence Program Series *	Structured Activity	No	No	18	4 Jun 2020 - 3 Jun 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Winfield Ho 3603 2522
80/122/11	AIA International Limited (Incorporated in Bermuda with limited liability)	Sales Training Series *	Structured Activity	No	No	33.5	01 Jan 2021 - 31 Dec 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Business Partners	Mr PANG Kai Yiu, Wilson 2100 1928
80/122/13	AIA International Limited (Incorporated in Bermuda with limited liability)	Selling and Soft Skill Training *	Structured Activity	No	No	29	01 Jan 2021 - 31 Dec 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Business Partners	Mr PANG Kai Yiu, Wilson 2100 1928

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80/122/14	AIA International Limited (Incorporated in Bermuda with limited liability)	Hard Skill Training *	Structured Activity	No	No	37.5	01 Jan 2021 - 31 Dec 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Business Partners	Mr PANG Kai Yiu, Wilson 2100 1928
80/122/15	AIA International Limited (Incorporated in Bermuda with limited liability)	Sales Program *	Structured Activity	No	No	7	01 Jan 2021 - 31 Dec 2021	In-house 內部員工 + Commissioning Body 委託機構員工 +	Mr PANG Kai Yiu, Wilson 2100 1928
80/122/16	AIA International Limited (Incorporated in Bermuda with limited liability)	Corporate Solutions Series *	Structured Activity	No	No	29.5	01 Jan 2021 - 31 Dec 2021	In-house 內部員工 + Public 公眾人士 + Commissioning Body	Mr PANG Kai Yiu, Wilson 2100 1928
80/122/17	AIA International Limited (Incorporated in Bermuda with limited liability)	Efficient Communication for Trustee Governance Issue Workshop	Structured Activity	No	No	2.5	01 Jan 2021 - 31 Dec 2021	In-house 內部員工	Mr PANG Kai Yiu, Wilson 2100 1928
80/122/18	AIA International Limited (Incorporated in Bermuda with limited liability)	MPFPA Closing Workshop 強積金成交工作坊	E-learning Activity	N/A	No	2	19 Oct 2020 - 18 Oct 2021	In-house 內部員工 + Others: AIA Financial Planners (MPF intermediaries)	Miss Ho Man Chi, Manchi 2100 1406
80/122/19	AIA International Limited (Incorporated in Bermuda with limited liability)	Group Insurance Quick Workshop 團體保險速成工作坊	E-learning Activity	N/A	No	1	19 Oct 2020 - 18 Oct 2021	In-house 內部員工 + Others: AIA Financial Planners (Insurance agents)	Miss Ho Man Chi, Manchi 2100 1406
80/126/11	The Bank of East Asia Ltd	Conduct Issues and Updates of the MPFA System for MPF Intermediaries 強積金中介人操守及強積金制度發展	Structured Activity	No	No	2	7 Oct 2020 - 6 Oct 2021	In-house 內部員工	Ms Wong Ching Wa 3608 4874
80/129/04	Altruist Concepts Limited	A Refresher Toolkit for Insurance Practitioners *	Structured Activity	No	No	10	1 May 2020 - 30 Apr 2021	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Alex Choi 2297 8940 / 9752 3566

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80/131/06	BMI Professional Training Centre Limited	Market Updates for Insurance and Ethics or Regulations *	Structured Activity	No	No	12	23 Dec 2020 - 22 Dec 2021	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Meko CHOW 25939645
80/135/09	Principal Investment & Retirement Services Limited	Tax Deductible Voluntary Contributions (TVCs) Training for MPF Intermediaries 「可扣稅自願性供款」強積金中介人培訓	Structured Activity	No	No	2	6 May 2020 - 5 May 2021	In-house 內部員工 + Others: MPF licensed intermediaries	Miss Tracy Ng 2263 0691
80/135/10	Principal Investment & Retirement Services Limited	Conduct Issues and Development of MPF System for MPF Intermediaries 強積金中介人操守 及強積金制度發展	Structured Activity	Yes	No	2	15 Jan 2021 - 14 Jan 2022	MPF Licensed Intermediaries	Miss Tracy NG 22630691
80/138/10	China Life Insurance (Overseas) Company Limited	代理員市場行為規範	Structured Activity	No	No	3	7 Feb 2020 - 6 Feb 2021	In-house 內部員工 + Public 公眾人士 + Commissioning Body	Mr Wong Yiu Fai 2835 0293
80/138/16	China Life Insurance (Overseas) Company Limited	Closer Look on Compliance in Selling MPF 強積金合規銷售睇真D	Structured Activity	Yes	No	2	1 Sep 2020 - 31 Aug 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers	Miss Lau Pui Shan, Cara 28317948
80/138/24	China Life Insurance (Overseas) Company Limited	強積金業務課程 *	Structured Activity	Yes	No	5.5	17 Jul 2020 - 16 Jul 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers	Miss Lau Pui Shan, Cara 28317948
80/138/26	China Life Insurance (Overseas) Company Limited	財務運算 *	Structured Activity	No	No	9	1 Mar 2021 - 28 Feb 2022	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Yu Shing Chun, Jebv28317924
80/141/02	Hong Kong Chamber of Insurance Intermediaries	香港保險中介人商會持續專業發展課程 *	Structured Activity	No	No	18	14 Oct 2020 - 13 Oct 2021	Public 公眾人士 + Others: 商會會員	Mr Jason Ho 67283758

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80/143/07	BCT Financial Limited	Conduct Issues and Updates of the MPFA System for MPF Intermediaries 強積金中介人操守及強積金制度發展	Structured Activity	Yes	Yes	2	30 Nov 2020 - 29 Nov 2021	In-house 內部員工 + Others: Subsidiary Intermediaries of channel partners	Mr Kelvin Chiu 22989178
80/144/02	International Association of Registered Financial Consultants HK and Macau Centre Company Limited	Certificate in Financial Consulting (Executive Program) 資深財務策劃顧問證書課程	Structured Activity	No	No	14	10 Jan 2021 - 09 Jan 2022	Public 公眾人士	Mr Allan Wan 31522314
80/151/04	Zurich Insurance Company Limited	The Essentials to attract high-end customer & handle challenging situation	Structured Activity	No	No	4	1 May 2020 - 30 Apr 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Terry So 2977 0632
80/151/06	Zurich Insurance Company Limited	Inspiration and Case Analysis on Travel Insurance	Structured Activity	No	No	3	1 Mar 2020 - 28 Feb 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Annie Lam 2977 0196
80/151/07	Zurich Insurance Company Limited	Ethics & Regulations applicable to insurance intermediaries 保險中介人的法規及道德培訓課程	Structured Activity	Yes	Yes	3	16 Dec 2020 - 15 Dec 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Terry SO 29770632
80/154/03 Renewed	APEC Education Limited	China Political and Economical Series --- The Opportunity for Financial Planner (理財策劃人員到內地工作需知)	Structured Activity	Yes	No	10	25 Mar 2021 - 24 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms CHAN MING LING, EVA 90801696
80/154/04	APEC Education Limited	強積金投資攻略	Structured Activity	No	No	5	20 Oct 2020 - 19 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Chan Ming Ling, Eva 9080 1696
80/154/06 Renewed	APEC Education Limited	"一帶一路"倡議 粵港澳大灣區與香港金融業務的機遇*	Structured Activity	Yes	No	5	25 Mar 2021 - 24 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms CHAN MING LING, EVA 90801696
80/155/03	Universal Prestige Institute	Professional Will Writing for Insurance Intermediaries	Structured Activity	No	No	10	1 May 2020 - 30 Apr 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Sara Tsui 5403 3303

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80/155/04	Universal Prestige Institute	Trust and Succession Wealth Management in Hong Kong and the PRC 香港及中國信託與傳承財富管理	Structured Activity	No	No	10	1 Jun 2020 - 31 May 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Sara Tsui 5403 3303
80/155/05	Universal Prestige Institute	Asset Management and knowledge within marriage and its laws 婚姻的規則與理財規劃 *	Structured Activity	No	No	8	1 Jun 2020 - 31 May 2021	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Sara Tsui 5403 3303
80/155/09	Universal Prestige Institute	The effective communication, personality analysis and sales technique for insurance intermediaries 保險中介的有效溝通，性格分析和銷售技巧課程 *	Structured Activity	No	No	8	10 Jun 2020 - 9 Jun 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Sara Tsui 5403 3303
80/155/10	Universal Prestige Institute	Mediation for Insurance Intermediaries 保險中介人調解基礎知識	Structured Activity	No	No	10	1 Dec 2020 - 30 Nov 2021	In-house 內部員工 + Public 公眾人士	Ms Sara Tsui 5403 3303
80/160/06	Heepon Company Limited	Issues in General Insurance and Insurance Practice 一般保險及實踐之論題 *	Structured Activity	Yes	No	24	20 Jun 2020 - 19 Jun 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Wong 6103 8938
80/163/03	Hong Kong Academy of Professional Studies	Insurance Compliance Series 保險合規系列 *	Structured Activity	No	No	4.5	3 Feb 2020 - 2 Feb 2021	Commissioning Body 委託機構員工	Ms Irene Kwok 2387 0010
80/164/10	CPD Centre	香港保險業制度與法規 *	Structured Activity	No	Yes	10	3 Oct 2020 - 2 Oct 2021	Commissioning Body 委託機構員工	Mr Luk Tai Choi 9677 1027
80/166/02	Tahoe Life Insurance Company Limited	Financial Planner Development Program 理財顧問事業發展課程 *	Structured Activity	Yes	No	8	25 Jan 2021 - 24 Jan 2022	In-house 內部員工 + Others: Business Partners (Brokerage staff, Bank staff)	Mr Pak Wing Vincent LEE 37679274
80/166/03	Tahoe Life Insurance Company Limited	Basic Knowledge of Investment-linked Long Term Insurance Series 投資相連長期保險基礎系列 *	Structured Activity	Yes	No	6	26 Jan 2021 - 25 Jan 2022	In-house 內部員工 + Others: Business Partners (Brokerage staff, Bank staff)	Mr Pak Wing Vincent LEE 37679274

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80/166/04	Tahoe Life Insurance Company Limited	Health and Wealth Planning Management for High Net-Worth Clients Program 高端客戶之健康與財富規劃管理課程 *	Structured Activity	Yes	No	13	1 Feb 2021 - 31 Jan 2022	In-house 內部員工 + Business Partners (Brokerage staff, Bank staff)	Mr Pak Wing Vincent LEE 37679274
80/167/11	Bank of China (Hong Kong) Limited	投資合規	Structured Activity	Yes	No	6	27 May 2020 - 26 May 2021	In-house 內部員工	Ms Luk Shiu Yan Sharon 3197 5344
80/167/12	Bank of China (Hong Kong) Limited	分行合規	Structured Activity	Yes	No	3	27 May 2020 - 26 May 2021	In-house 內部員工	Ms Luk Shiu Yan Sharon 3197 5344
80/167/16	Bank of China (Hong Kong) Limited	固定收益投資101	Structured Activity	No	No	2	3 May 2020 - 2 May 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Leung Man Chi GiGi 3197 5336
80/167/17	Bank of China (Hong Kong) Limited	客盤管理與關係深化	Structured Activity	Yes	No	7	29 Jan 2021 - 28 Jan 2022	In-house 內部員工	Ms LUK Shiu Yan, Sharon 31975344
80/167/18	Bank of China (Hong Kong) Limited	季度投資市場分析講座 *	Structured Activity	Yes	No	6	11 Jan 2021 - 10 Jan 2022	In-house 內部員工	Ms SHIU YAN SHARON LUK 31975344
80/168/03	Hong Kong Insurance Intermediaries Association Ltd	工程保險、專業責任保險、貨運代理 責任保險 及業主立案法團保險 *	Structured Activity	Yes	No	8	25 Jul 2020 - 24 Jul 2021	Others: Member of the Association (HKIIA) and Insurance Practitioners in Hong Kong	Mr Bill Ho 9800 8890
80/168/04	Hong Kong Insurance Intermediaries Association Ltd	保險業監管及法規 *	Structured Activity	Yes	No	8	25 Jul 2020 - 24 Jul 2021	Others: Member of the Association (HKIIA) and Insurance Practitioners in Hong Kong	Mr Bill Ho 9800 8890
80/168/05	Hong Kong Insurance Intermediaries Association Ltd	Personal Insurance Series 個人保險系列 *	Structured Activity	Yes	No	8	1 Jun 2020 - 31 May 2021	Commissioning Body 委託機構員工 + Others: Members of the Association (HKIIA), Insurance and financial Planning related personnel	Mr Bill Ho 9800 8890
80/173/08	Prudential General Insurance Hong Kong Limited	Group Medical Insurance Training	Structured Activity	Yes	No	2	25 Feb 2021 - 24 Feb 2022	In-house 內部員工	Ms Janice Churk 37225782

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80/173/09	Prudential General Insurance Hong Kong Limited	Home Insurance Training	Structured Activity	Yes	No	2	12 Aug 2020 - 11 Aug 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Janice Churk 3722 5782
80/173/12	Prudential General Insurance Hong Kong Limited	Home Insurance Training - Water Seepage	Structured Activity	No	No	2	13 Apr 2020 - 12 Apr 2021	In-house 內部員工	Ms Janice Churk 3722 5782
80/177/02	VIP Consultancy Ltd	Marine Cargo Insurances 海上貨物運輸保險 *	Structured Activity	No	No	5	15 Jan 2021 - 14 Jan 2022	Public 公眾人士	Mr Kong Fat WONG 97326909
80/177/03	VIP Consultancy Ltd	Motor Insurance (Third Party Risk) Ordinance and Motor Insurance Policy 汽車保險(第三者風險)條例與汽車保險 單條款 *	Structured Activity	Yes	No	10	15 Jan 2021 - 14 Jan 2022	Public 公眾人士	Mr Kong Fat WONG 97326909
80/177/04	VIP Consultancy Ltd	Employee Compensation and Negligence Claims 僱員補償與疏忽索償 *	Structured Activity	Yes	No	10	21 Nov 2020 - 20 Nov 2021	Public 公眾人士	Mr Wong Kong Fat 9732 6909
80/179/03	The Orchard Partnership Limited	World Class Communication Skills *	Structured Activity	No	No	16	3 Nov 2020 - 2 Nov 2021	Others: a. Licensed Individual Insurance Agents (including Principals appointed by authorized Insurers) b. Licensed Technical Representative (Agent) c. Licensed Technical	Ms Kate Johnson 56978643
80/183/03	Grandtag Financial Consultancy & Insurance Brokers Limited	The introduction to fundamental insurance law and principles *	Structured Activity	Yes	No	6	10 Aug 2020 - 9 Aug 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Alice Cheng 2866 5577
80/188/02	Professional Training Association	現代理財規劃	Structured Activity	No	No	6	26 May 2020 - 25 May 2021	Public 公眾人士	Ms Cheung Wai Ping Sandy 2301 9828
80/188/03	Professional Training Association	現代理財規劃之 實用財務計算機課程	Structured Activity	No	No	4	26 May 2020 - 25 May 2021	Public 公眾人士	Ms Cheung Wai Ping Sandy 2301 9828

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80/189/03	QBE Hongkong & Shanghai Insurance Limited	Insurance Claims Complaints Case Sharing 保險索償投訴個案分享	Structured Activity	No	No	5	1 Aug 2020 - 31 Jul 2021	In-house 內部員工 + Others: Insurance Agents and Insurance Brokers	Mr Edward Chan 2253 3594
80/189/04	QBE Hongkong & Shanghai Insurance Limited	Knowing more about General Insurance 一般保險知多點 *	Structured Activity	No	No	6	1 Jan 2021 - 31 Dec 2021	In-house 內部員工 + Insurance Agents and Insurance Brokers	Mr Edward Chan 852 2253 3594
80/189/05	QBE Hongkong & Shanghai Insurance Limited	Knowing more about Financial Lines Insurance Products 金融保險產品知多點	Structured Activity	No	No	5.5	22 Sep 2020 - 21 Sep 2021	In-house 內部員工 + Others: Insurance Agents and Insurance Brokers	Mr Edward Chan 2253 3594
80/189/07	QBE Hongkong & Shanghai Insurance Limited	Knowing More about Insurance Claims 保險索償知多點 *	Structured Activity	Yes	No	10	1 Nov 2020 - 31 Oct 2021	In-house 內部員工 + Others: Insurance Agents and Insurance Brokers	Mr Edward Chan 2253 3594
80/191/02	Bank of China Group Insurance Company Limited	General Insurance Training Program 一般保險培訓課程 *	Structured Activity	No	No	6	1 Aug 2020 - 31 Jul 2021	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Business Partners, Brokers	Mr Wong Chung Lai 22366639
80/194/05	Cybercredit Education Limited	Retirement Planning 退休規劃	Structured Activity	No	No	5	1 Mar 2020 - 28 Feb 2021	Public 公眾人士	Dr Fung Kam Man 9019 1444
80/194/06	Cybercredit Education Limited	Estate Planning 遺產規劃	Structured Activity	No	No	5	1 Mar 2020 - 28 Feb 2021	Public 公眾人士	Dr Fung Kam Man 9019 1444
80/195/02	Enrich Culture Group	Practical Training Program for Professional Financial Advisors 專業理財顧問實務培訓課程 *	Structured Activity	Yes	No	39	20 May 2020 - 19 May 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Ling So 2170 7972
80/195/03	Enrich Culture Group	Wealth Management Series 1 財富管理- 富足規劃系列一 *	Structured Activity	Yes	No	8	26 Feb 2021 - 25 Feb 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Ling SO 21707972

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80/195/04	Enrich Culture Group	Medical & Health Planning CPD Series 醫療及健康規劃CPD培訓課程 *	Structured Activity	Yes	No	8	1 Jan 2021 - 31 Dec 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Ling So 21707972
80/198/02	Euler Hermes Hong Kong Services Limited	Trade Credit Insurance - Comprehensive Introduction and Efficient Prospecting Workshop	Structured Activity	No	No	2	1 Jun 2020 - 31 May 2021	In-house 內部員工 + Others: Business partner	Ms Shirley Li 3665 8919
80/198/03	Euler Hermes Hong Kong Services Limited	Bonding/Surety Business - Comprehensive Introduction and Efficient Prospecting Workshop	Structured Activity	No	No	2	24 Feb 2020 - 23 Feb 2021	In-house 內部員工 + Others: Business partner	Ms Shirley Li 3665 8919
80/199/02	Axis Legal and Compliance Services Co. Limited	A Practical Guide of Anti-Money Laundering and Prevention of Bribery for Insurance Industry 保險業反洗黑錢及 預防賄賂的實務指引 *	Structured Activity	No	No	3	25 Apr 2020 - 24 Apr 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Wong Ming Kit 6015 3603
80/199/03	Axis Legal and Compliance Services Co. Limited	A Practical Guide of Customer Data Protection for Insurance Industry 保險業保障客戶資料的實務指引	Structured Activity	No	No	2	25 Apr 2020 - 24 Apr 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Wong Ming Kit 6015 3603
80/202/06	China Taiping Life Insurance (Hong Kong) Company Limited	New Agents Training Course 新入職代理人培訓課程 *	Structured Activity	Yes	No	14	24 Nov 2020 - 23 Nov 2021	In-house 內部員工	Miss Ching Man, Mandy WONG 2855 5565
80/202/07	China Taiping Life Insurance (Hong Kong) Company Limited	Parent-Child Financial Keys 親子理財全接觸	Structured Activity	Yes	No	3.5	1 Apr 2021 - 31 Mar 2022	In-house 內部員工 + Others: insurance agents, brokers, agents from partners' bank	Miss Ching Man, Mandy WONG 2855 5565
80/202/08	China Taiping Life Insurance (Hong Kong) Company Limited	Nurturing Leadership Series 領袖培育系列 *	Structured Activity	Yes	No	7	1 Apr 2021 - 31 Mar 2022	In-house 內部員工 + Others: insurance agents, brokers, agents from partners' bank	Miss Ching Man, Mandy WONG 2855 5565
80/202/09	China Taiping Life Insurance (Hong Kong) Company Limited	How to manage new generation 如何管理新世代	Structured Activity	Yes	No	2.5	1 Apr 2021 - 31 Mar 2022	In-house 內部員工 + Others: insurance agents, brokers, agents from partners' bank	Miss Ching Man, Mandy WONG 2855 5565

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80/202/10	China Taiping Life Insurance (Hong Kong) Company Limited	Recruitment and Retention Program 招募與留才培訓 *	Structured Activity	Yes	No	10	25 Jan 2021 - 24 Jan 2022	In-house 內部員工 + Others: insurance agents, licensed staff from partners' banks and brokers	Miss Ching Man, Mandy WONG 2855 5565
80/202/11	China Taiping Life Insurance (Hong Kong) Company Limited	Interpersonal Communication Skill: Enneagram 人際溝通技巧：九型人格	Structured Activity	Yes	No	3.5	1 Feb 2021 - 31 Jan 2022	In-house 內部員工 + Others: insurance agents, staff from partner's banks, brokers	Miss Ching Man, Mandy WONG 2855 5565
80/202/12	China Taiping Life Insurance (Hong Kong) Company Limited	Anti-Money Laundering & Terrorists Financing 打擊洗錢及恐怖分子資金籌集等合規指 引培訓	Structured Activity	Yes	Yes	3.5	22 Feb 2021 - 21 Feb 2022	In-house 內部員工 + Commissioning Body 委託機構員工 + Others: insurance agents, brokers, agents from partners	Miss Wong Ching Man, Mandy 2855 5565
80/206/02	Institute of Professional Education and Knowledge (PEAK) of the VTC & IVE (HakingWong) of the VTC.	CPD Programs for Travel Insurance Agents 旅遊保險代理持續進修課程 *	Structured Activity	No	No	21	23 Apr 2020 - 22 Apr 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/207/02	Huabo Wealth Management (Hong Kong) Company Limited	保險從業員須具備的精算知識 *	Structured Activity	No	No	8	14 Aug 2020 - 13 Aug 2021	In-house 內部員工 + Public 公眾人士	Miss Katrina Xu 21918558
80/212/03	Mercer (Hong Kong) Limited	HK Voluntary Health Insurance Scheme: Key Facts, Updates & Considerations	Structured Activity	Yes	No	2	9 Oct 2020 - 8 Oct 2021	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Mandy Lui 2864 5333
80/214/02	Willis Hong Kong Limited	Managing risk through analytics	Structured Activity	No	No	2	1 Oct 2020 - 30 Sep 2021	In-house 內部員工	Ms Jaime Mong 2195 5626

Ref 參考編號	Name of CPD Activity Provider 舉辦機構名稱	Title of Activity 活動名稱	Type of the Activity 活動類別	Virtual Classroom Delivery (for Structured Activity) 虛擬教室授課模式 (適用於有系統的活動)	CPD activity under the category of "Ethics or Regulations" 活動內容為「道德或規例」	No. of CPD hours 持續專業 培訓時數	Current Approval Period 現行 審批期限	Target Participant 培訓對象	Contact 聯絡方法
80/214/03	Willis Hong Kong Limited	Retirement Planning and Implication to Retirement Landscape in Hong Kong	Structured Activity	No	No	2	1 Oct 2020 - 30 Sep 2021	In-house 內部員工	Ms Jaime Mong 2195 5626
80/214/07	Willis Hong Kong Limited	Employees' Compensation Claims – Overview of Employees' Compensation Ordinance and Claims Handling Procedure	Structured Activity	No	No	2	6 Jul 2020 - 5 Jul 2021	In-house 內部員工	Ms Jaime Mong 2195 5626
80/214/08	Willis Hong Kong Limited	Business Conduct	Structured Activity	No	Yes	2	15 Jun 2020 - 14 Jun 2021	In-house 內部員工	Ms Jaime Mong 2195 5626
80/214/09	Willis Hong Kong Limited	Financial Risks *	Structured Activity	No	No	4	15 Jun 2020 - 14 Jun 2021	In-house 內部員工	Ms Jaime Mong 2195 5626
80/222/02	Wa Hong International Training And Education Group	投資規劃培訓系列 *	Structured Activity	No	No	8	1 May 2020 - 30 Apr 2021	Public 公眾人士 + Commissioning Body 委託機構員工 + Others: Agent, Broker	Mr Lai Ping Wa 9348 1521
80/222/03	Wa Hong International Training And Education Group	銷售人員登峰培訓系列 *	Structured Activity	No	No	8	20 Jul 2020 - 19 Jul 2021	Public 公眾人士 + Commissioning Body 委託機構員工 + Others: Agent, Broker	Mr Chan Yu Keung 9086 9517

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80/227/02	Vista Academy Co Limited	Insurance Management and Legal Studies Series *	Structured Activity	Yes	No	12	17 Jun 2020 - 16 Jun 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Rachael Lai 5501 9366
80/227/03	Vista Academy Co Limited	Personal Lines and SME Insurance Series *	Structured Activity	Yes	No	10	1 Jul 2020 - 1 Sep 2020	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Rachael Lai 5501 9366
						12	2 Sep 2020 - 30 Jun 2021		
80/229/02	Triple L International Training Centre Limited	Medical Seminar *	Structured Activity	No	No	12.5	20 May 2020 - 19 May 2021	Public 公眾人士	Mr Hu Man Sing 9220 7871
80/231/02 Renewed	Midland University Limited	認識業主面對的風險以拓展保險業務	Structured Activity	Yes	No	2	06 Mar 2021 - 05 Mar 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Miss Peony WAN 23168880
80/233/02	Hin Wick Business Services Limited	Ordinances, Compliance and Ethics in Insurance Industry 保險業相關法例、 合規及道德要求 *	Structured Activity	No	Yes	10	18 Jul 2020 - 17 Jul 2021	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Leung Yat Hin 6408 3453
80/236/02	HKPC Academy of Hong Kong Productivity Council	Corporate sustainability trends and its application to the insurance industry 保險業與企業可持續 發展新趨勢	Structured Activity	No	No	3	18 Feb 2020 - 17 Feb 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Marius Chow 2788 5816
80/236/03	HKPC Academy of Hong Kong Productivity Council	Five-dimensional Risk Management for Effective Insurance Selling 全方位五維風管及銷售技巧	Structured Activity	No	No	3	18 Feb 2020 - 17 Feb 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Marius Chow 2788 5816

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80/236/04	HKPC Academy of Hong Kong Productivity Council	Sustainable and Responsible Investment: The Rising Star 可持續及負責任投資新趨勢	Structured Activity	No	No	3	18 Feb 2020 - 17 Feb 2021	In-house 內部員工 + Public 公眾人士	Mr Marius Chow 2788 5816
80/236/05	HKPC Academy of Hong Kong Productivity Council	Effective Team management for Insurance Intermediaries 保險中介人實效團隊管理	Structured Activity	No	No	3	19 Feb 2021 - 18 Feb 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Chow Sai Ho, Marius 2788 5816
80/236/06	HKPC Academy of Hong Kong Productivity Council	Financial Planning Experience Design (Integration of Behavioural Finance and Investment Psychology) 實效財務計劃體驗設計 (行為金融學與投資心理學) *	Structured Activity	No	No	3	10 Feb 2020 - 9 Feb 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Marius Chow 2788 5816
80/236/07	HKPC Academy of Hong Kong Productivity Council	Practical Application of Behavioral Finance to Financial Planning & Investment Portfolio Building 行為金融學應用 (理財策劃及建構投資組合) *	Structured Activity	No	No	3	10 Feb 2020 - 9 Feb 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Marius Chow 2788 5816
80/236/08	HKPC Academy of Hong Kong Productivity Council	AMLO Statutory Requirements & Update 《打擊洗錢及恐怖分子資金籌集條例 》的合規要求新知	Structured Activity	No	No	3	3 Aug 2020 - 2 Aug 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Marius Chow 2788 5816
80/236/09	HKPC Academy of Hong Kong Productivity Council	Code of Conduct for Licensed Insurance Agents 保險業監管局對保險中介人的操守要 求	Structured Activity	No	Yes	3	3 Aug 2020 - 2 Aug 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Marius Chow 2788 5816
80/236/10	HKPC Academy of Hong Kong Productivity Council	How to reach Financial Freedom 如何達到財務自由	Structured Activity	No	No	3	3 Aug 2020 - 2 Aug 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Marius Chow 2788 5816

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80/236/11	HKPC Academy of Hong Kong Productivity Council	Finance Technological Crime and Loss Prevention 金融科技罪行與防損措施	Structured Activity	No	No	3	3 Aug 2020 - 2 Aug 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Marius Chow 2788 5816
80/236/12 New	HKPC Academy of Hong Kong Productivity Council	New Finance – Behavioural Finance & Sustainable Investments 新金融學 - 行為金融及可持續投資 *	Structured Activity	Yes	No	9	24 Mar 2021 - 23 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr CHOW Sai Ho, Marius 2788 5816
80/236/13 New	HKPC Academy of Hong Kong Productivity Council	Sustainable Business Development and Effective Team Management 可持續業務發展與實效團隊管理 *	Structured Activity	Yes	No	9	24 Mar 2021 - 23 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr CHOW Sai Ho, Marius 2788 5816
80/236/14 New	HKPC Academy of Hong Kong Productivity Council	Ethics & Regulations for Insurance & Finance Professionals 保險金融從業員的道德與規例要求 *	Structured Activity	Yes	No	12	24 Mar 2021 - 23 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr CHOW Sai Ho, Marius 2788 5816
80/236/15 New	HKPC Academy of Hong Kong Productivity Council	Project Investments & Financial Freedom 項目投資與財務自由 *	Structured Activity	Yes	No	9	24 Mar 2021 - 23 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr CHOW Sai Ho, Marius 2788 5816
80/238/02	Asia Insurance Co Ltd	Anti-Money Laundering and Counter- Terrorist Financing Training	Structured Activity	No	No	2	4 May 2020 - 3 May 2021	In-house 內部員工	Mr Chin Yiu 3606 9969
80/238/03	Asia Insurance Co Ltd	Enterprise Risk Management Training	Structured Activity	No	No	2	19 Jun 2020 - 18 Jun 2021	In-house 內部員工	Mr Chin Yiu 3606 9969