

Insurance Intermediaries Quality Assurance Scheme
List of Currently Approved CPD Activities
保險中介人素質保證計劃
獲批准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)

*: 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.

#: This CPD activity was approved by the HKCAAVQ for the purpose of fulfilling the IL CPD requirement of completing 20 extra CPD hours dedicated towards the additional modules of the enhanced Investment-linked Long Term Insurance Examination under the Insurance Intermediaries Qualifying Examination (“IL CPD hours”) within the two-year transitional period (i.e. 1 March 2010 to 29 February 2012). Both the Office of Commissioner of Insurance and HKCAAVQ agreed that it can be a regular qualified CPD activity under the IIQAS CPD Programme provided that it is still approved by the HKCAAVQ. However, anyone attending this CPD activity after 29 February 2012 is not entitled to any IL CPD hours (as the transitional period for the IL CPD requirement already expired on 29 February 2012) but is only entitled to CPD hours that can be counted towards the annual CPD requirement of 10 CPD hours applicable to all insurance intermediaries.

New: Newly approved activities

Renewed: Approval-Renewed activities

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 * | 9 | 1 Sep 2019 - 31 Aug 2020 | 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 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|--|-------------------------------------|--|--|---|
| 80/02/64 | FWD Life Insurance Company (Bermuda) Limited | HNW Specialist Program 高端客戶專才顧問課程 * | 10 | 14 Mar 2019 - 13 Mar 2020 | In-house 內部員工 | Miss Cheung Yau Gi Carman 2281 3242 |
| 80/02/66 | FWD Life Insurance Company (Bermuda) Limited | Freshmen Career Development Program 新晉顧問事業發展課程 * | 4 | 1 Feb 2019 - 31 Jan 2020 | In-house 內部員工 | Mr Pun Meng In 2281 2723 |
| 80/02/73 | FWD Life Insurance Company (Bermuda) Limited | Agency Management Core Program Series 營業領袖核心課程系列 * | 18 | 1 Mar 2019 - 29 Feb 2020 | In-house 內部員工 | Mr Chan Wai Yip Dennis 2281 2708 |
| 80/02/74 | FWD Life Insurance Company (Bermuda) Limited | Financial Planning Program 理財策劃課程 * | 15 | 19 Mar 2019 - 18 Mar 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Business Partner | Ms Ng Siu Kuen, Christine 2281 2705 |
| 80/02/81 | FWD Life Insurance Company (Bermuda) Limited | Concept Selling Series 概念銷售系列 * | 12 | 10 Apr 2019 - 9 Apr 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 | Mr Pun Meng In 2281 2723 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|---|-------------------------------------|--|---|-------------------------------------|
| 80/02/83 | FWD Life Insurance Company (Bermuda) Limited | Service Based Series 服務為本系列 * | 8 | 12 Apr 2019 - 11 Apr 2020 | In-house 內部員工 + Others: Business Partners, the potential agents who are going to join our company | Mr Ip Po Hung Rex 2281 2709 |
| 80/02/87 | FWD Life Insurance Company (Bermuda) Limited | Selling Level Up Series 銷售提升系列 * | 12 | 6 Apr 2019 - 5 Apr 2020 | In-house 內部員工 + Others: Business Partners, the potential agents who are going to join our company | Mr Ip Po Hung Rex 2281 2709 |
| 80/02/88 | FWD Life Insurance Company (Bermuda) Limited | Agency Management Extended Series 營業領袖延伸課程系列 * | 8 | 25 Jan 2019 - 24 Jan 2020 | In-house 內部員工 + Others: Business Partners | Mr Chan Wai Yip Dennis 2281 2708 |
| 80/02/89 | FWD Life Insurance Company (Bermuda) Limited | Winning Tactics in Insurance Practice 保險實務全攻略 * | 10 | 26 Apr 2019 - 25 Apr 2020 | In-house 內部員工 + Others: Business partners | Mr Ip Po Hung Rex 2281 2709 |
| 80/02/90 | FWD Life Insurance Company (Bermuda) Limited | HNW Sharing Session 高端客戶業務概覽 * | 8 | 29 Mar 2019 - 28 Mar 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Business Partners | Ms Vicky Tang 2850 3308 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|---|-------------------------------------|--|---|--------------------------------|
| 80/02/91 | FWD Life Insurance Company (Bermuda) Limited | Know your Customer 了解你的客戶 * | 8 | 15 Apr 2019 - 14 Apr 2020 | Commissioning Body 委託機構員工 + Others: Business Partners | Ms Vicky Tang 2850 3308 |
| 80/02/92 | FWD Life Insurance Company (Bermuda) Limited | Agency Training Conference 富衛營業培訓會議 | 5 | 8 Apr 2019 - 7 Apr 2020 | In-house 內部員工 + Public 公眾人士 + Others: Business Partners | Mr IP Po Hung Rex 2281 2709 |
| 80/02/93 | FWD Life Insurance Company (Bermuda) Limited | Selling Cycle 銷售流程 * | 8 | 1 Jul 2019 - 30 Jun 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Business Partners | Ms Vicky Tang 2850 3308 |
| 80/04/04 | YF Life Insurance International Limited | Fundamental Agency Management Training | 5.5 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers | Mr Edmond Tse 2919 9568 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|--------------------------------------|-------------------------------------|--|---|-----------------------------|
| 80/04/05 | YF Life Insurance International Limited | Investment-Linked Insurance Training | 5.5 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers | Mr Edmond Tse 2919 9568 |
| 80/04/11 | YF Life Insurance International Limited | Advanced Insurance Seminar * | 5 | 1 Oct 2019 - 30 Sep 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 | Miss Athena Ho 2919 9573 |
| 80/04/14 | YF Life Insurance International Limited | Handling Objection Workshop | 2.5 | 1 Oct 2019 - 30 Sep 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 | Miss Athena Ho 2919 9573 |
| 80/04/21 | YF Life Insurance International Limited | Enhancing Your Selling Efficiency * | 8 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: brokers | Mr Edmond Tse 2919 9568 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|--|-------------------------------------|--|---|----------------------------|
| 80/04/24 | YF Life Insurance International Limited | SuperRecruiter Program | 11 | 21 Jan 2019 - 20 Jan 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: brokers | Mr Edmond Tse 2919 9568 |
| 80/04/28 | YF Life Insurance International Limited | Prospecting Workshop 《尋找客源工作坊》 | 2.5 | 1 Feb 2019 - 31 Jan 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers | Mr Edmond Tse 2919 9568 |
| 80/04/31 | YF Life Insurance International Limited | Seminars on financial planning, legal, & compliance knowledge (I) * | 11 | 1 Apr 2019 - 31 Mar 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers | Mr Edmond Tse 2919 9568 |
| 80/04/34 | YF Life Insurance International Limited | Seminars on financial planning, legal, & compliance knowledge (II) * | 9 | 1 Apr 2019 - 31 Mar 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers | Mr Edmond Tse 2919 9568 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|--|-------------------------------------|--|---|----------------------------|
| 80/04/37 | YF Life Insurance International Limited | Seminars on financial planning, legal, & compliance knowledge (III) * | 8 (Long Version) | 1 Apr 2019 - 31 Mar 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers | Mr Edmond Tse 2919 9568 |
| | | | 7 (Shorter Version 1) | | | |
| 80/04/41 | YF Life Insurance International Limited | New Consultants Orientation Program * | 12.5 | 1 Mar 2019 - 29 Feb 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 | Mr Edmond Tse 2919 9568 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|--|-------------------------------------|--|---|-----------------------------------|
| 80/04/43 | YF Life Insurance International Limited | Selling with NLP Workshop | 5.5 | 1 Jul 2019 - 30 Jun 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers | Ms Ho Pui Yee Athena 2919 9573 |
| 80/04/47 | YF Life Insurance International Limited | Medical & Health Insurance Training Series * | 4 | 7 Jan 2019 - 6 Jan 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers | Mr Edmond Tse 2919 9568 |
| 80/04/48 | YF Life Insurance International Limited | Director Development Program | 10 | 1 Feb 2019 - 31 Jan 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers | Mr Edmond Tse 2919 9568 |
| 80/04/49 | YF Life Insurance International Limited | Medical & Health Insurance Training Series(II) * | 6 | 3 Apr 2019 - 2 Apr 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers | Mr Edmond Tse 2919 9568 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|------------------------|---|---|-------------------------------------|--|---|-----------------------------|
| 80/04/50 | YF Life Insurance International Limited | Seminars on financial planning, legal, & compliance knowledge (V) * | 8 | 25 Apr 2019 - 24 Apr 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers | Mr Edmond Tse 2919 9568 |
| 80/04/51 | YF Life Insurance International Limited | Tax Deductible Voluntary Contributions | 2 | 1 May 2019 - 30 Apr 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers | Mr Edmond Tse 2919 9568 |
| 80/04/52 | YF Life Insurance International Limited | Medical & Health Insurance Training Series(III) * | 4 | 5 Jul 2019 - 4 Jul 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers | Mr Edmond Tse 2919 9568 |
| 80/04/53 New | YF Life Insurance International Limited | Medical & Health Insurance Training Series (IV) * | 4 | 4 Oct 2019 - 3 Oct 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers | Miss Athena Ho 2919 9573 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|--|-------------------------------------|--|--|------------------------------|
| 80/05/02 | 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 | 6 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 + Others: Insurance Brokers with business association with AIA International Ltd. | Miss Esther Lai 3728 4041 |
| 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 | 6 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 + Others: Insurance Brokers (Insurance Brokers with business association with AIA International Ltd) | Miss Esther Lai 3728 4041 |
| 80/05/10 | AIA International Limited (Incorporated in Bermuda with limited liability) | Preparation Course for Paper 5 - Investment-Linked Long Term Insurance Examination | 6 | 1 Mar 2019 - 29 Feb 2020 | In-house 內部員工 + Others: Insurance Brokers (Insurance Brokers with business association with AIA HK) | Miss Esther Lai 3728 4041 |
| 80/05/33 | AIA International Limited (Incorporated in Bermuda with limited liability) | Financial Planner Trainee Program | 8 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 | Mr Aston Kwok 3728 4005 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|---|-------------------------------------|--|--|------------------------------|
| 80/05/34 | AIA International Limited (Incorporated in Bermuda with limited liability) | MPF Product and Selling Skills Training | 3.5 | 11 Apr 2019 - 10 Apr 2020 | 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 |
| 80/05/77 | AIA International Limited (Incorporated in Bermuda with limited liability) | Best Practices - Selling on a Winning Ground | 3 | 8 Jul 2019 - 7 Jul 2020 | In-house 內部員工 | Miss Esther Lai 3728 4041 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|---|-------------------------------------|--|---|------------------------------------|
| 80/05/112 | AIA International Limited (Incorporated in Bermuda with limited liability) | Telemarketing Skill Workshop - Direct Sales Program | 3 | 1 Jul 2019 - 30 Jun 2020 | 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 | 7 | 1 Jul 2019 - 30 Jun 2020 | 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 | 3.5 | 1 Jul 2019 - 30 Jun 2020 | 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 | 7 | 1 Feb 2019 - 31 Jan 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 | Mr Wayne Chan 3728 4062 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|--|-------------------------------------|--|---|------------------------------------|
| 80/05/131 | AIA International Limited (Incorporated in Bermuda with limited liability) | Professional Claims Series - Accident (Module 1 & 2) and Critical Illness (Module 3) * | 7 | 11 Aug 2019 - 10 Aug 2020 | In-house 內部員工 + Others: Insurance agents / brokers and agents from partner's bank | Mr Frank Mok 3728 4060 |
| 80/05/132 | AIA International Limited (Incorporated in Bermuda with limited liability) | AIA Premier Academy - Wealth Management Manager Program | 10 | 1 Dec 2018 - 30 Nov 2019 | In-house 內部員工 + Commissioning Body 委託機構員工 | Miss Kim Qiu 3728 4007 |
| 80/05/134 | AIA International Limited (Incorporated in Bermuda with limited liability) | Phone Skills Enrichment Workshop | 1 | 1 May 2019 - 30 Apr 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 | Ms Fan Siu Ping Carol 3108 1389 |
| 80/05/135 | AIA International Limited (Incorporated in Bermuda with limited liability) | Professional Claims Series - Hospitalization | 3.5 | 6 Jun 2019 - 5 Jun 2020 | 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 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|--|-------------------------------------|--|--|-------------------------------|
| 80/05/138 | AIA International Limited (Incorporated in Bermuda with limited liability) | The Merit of Utmost Good Faith 保險誠與信 | 3.5 | 1 Dec 2018 - 30 Nov 2019 | In-house 內部員工 + Others: Insurance agents / brokers and agents from partner's bank / Financial Consultant | Mr Ivan Chiu 3728 4022 |
| 80/05/139 | AIA International Limited (Incorporated in Bermuda with limited liability) | AIAPA Premier Academy - Executive Development Program | 10 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Agents | Miss Eyre Cheung 3728 4025 |
| 80/05/140 | AIA International Limited (Incorporated in Bermuda with limited liability) | The Essential Agency Management (AIA Premier Leaders Academy – Leadership Development Program) | 12 | 1 Feb 2019 - 31 Jan 2020 | In-house 內部員工 + Others: Insurance Agents | Mr Chris Mak 3728 4069 |
| 80/05/141 | AIA International Limited (Incorporated in Bermuda with limited liability) | Experienced Financial Planner Training Programme - Orientation | 3.5 | 1 Feb 2019 - 31 Jan 2020 | In-house 內部員工 | Mr Sam Siu 3728 4012 |
| 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 | 8 | 21 Sep 2019 - 20 Sep 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Financial Planners | Miss Phoebe Zhan 3728 4013 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|------------------------------|---|--|-------------------------------------|--|---|------------------------------------|
| 80/05/153 | AIA International Limited (Incorporated in Bermuda with limited liability) | Quality Recruitment Workshop 招募『新將』工作坊 | 7.5 | 21 Jan 2019 - 20 Jan 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 | Ms Fan Siu Ping Carol 3108 1389 |
| 80/05/161 | AIA International Limited (Incorporated in Bermuda with limited liability) | Wealth Accumulation Series (Customer Behavior) | 3 | 1 Dec 2018 - 30 Nov 2019 | In-house 內部員工 | Mr Sam Siu 3728 4012 |
| 80/05/162 Renewed | AIA International Limited (Incorporated in Bermuda with limited liability) | Professional Operations Training Course Series – M1 to M3 * | 9 | 1 Jan 2020 - 31 Dec 2020 | In-house 內部員工 + Others: Insurance agents/brokers and staff from partner's bank | Mr Frank Mok 3728 4060 |
| 80/05/163 | AIA International Limited (Incorporated in Bermuda with limited liability) | Financial Planning Training Series - M1 to M4 * | 13 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 + Others: Insurance agents/brokers and staff from partner's bank | Mr Frank Mok 3728 4060 |
| 80/05/166 | AIA International Limited (Incorporated in Bermuda with limited liability) | Policy Provision | 3 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 + Others: Insurance agents/brokers and staff from partner's bank | Mr Frank Mok 3728 4060 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|--|-------------------------------------|--|--|-----------------------------|
| 80/05/164 | AIA International Limited (Incorporated in Bermuda with limited liability) | Selection Interview Workshop | 4 | 1 Feb 2019 - 31 Jan 2020 | In-house 內部員工 | Mr Wayne Chan 3728 4062 |
| 80/05/165 | AIA International Limited (Incorporated in Bermuda with limited liability) | Recruiting PA Workshop | 4 | 11 Feb 2019 - 10 Feb 2020 | In-house 內部員工 | Mr Wayne Chan 3728 4062 |
| 80/05/167 | AIA International Limited (Incorporated in Bermuda with limited liability) | Right Start Selling Skills Training * | 4 | 3 Apr 2019 - 2 Apr 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: brokers partners and their subsidiaries | Mr Joe Tsoi 3728 4938 |
| 80/05/168 | AIA International Limited (Incorporated in Bermuda with limited liability) | Best Practice and Professional Standard Compliance Training 銷售有「法」 - 專業守則與習慣培訓課程 | 1.5 | 12 Jul 2019 - 11 Jul 2020 | In-house 內部員工 + Others: brokers partners and their subsidiaries | Mr Joe Tsoi 3728 4938 |
| 80/06/31 | Hong Kong Securities and Investment Institute | Overview of Legal and Regulatory Framework for Securities and Futures Industry | 5 | 12 Aug 2019 - 11 Aug 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Carina Yuen 3120 6230 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|--|-------------------------------------|--|--|---|
| 80/07/06 | 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” * | 16 | 1 Feb 2019 - 31 Jan 2020 | 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 |
| 80/07/07 | Institute of Professional Education and Knowledge, VTC | Hong Kong Insurance Legal Cases (with optional module of Alternative Insurance Dispute Resolution and/or Liability Insurance) * | 16 | 1 Mar 2019 - 29 Feb 2020 | 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 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|--|-------------------------------------|--|--|---|
| 80/07/09 | Institute of Professional Education and Knowledge, VTC | Motor Insurance Ordinance (with optional module of Motor Insurance and/or Motor Insurance Claims) * | 24 | 1 Mar 2019 - 29 Feb 2020 | 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 |
| 80/07/10 | 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 Liability” and/ or “Part IV-Employer's Liability and Motor Liability” and/ or “Part V-Directors' & Officers' Liabil 法律責任證書課程 第一單元 – 疏忽及因他人作為的責任” 及/或 選修個別單元 “第二單元 – 佔用人責任及產品責任” 及/或 選修個別單元 “第三單元– 嚴格責任” 及/或 選修個別單元 “第四單元 – 僱主責任及汽車責任” 及/或 選修個別單元 “第五單元 – 董事及行政人員責任、專業責任” 及/或 選修個別單元 “第六單元– 訴訟程序及損害賠償計算” * | 30 | 1 May 2019 - 30 Apr 2020 | 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 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|--|-------------------------------------|--|--|---|
| 80/07/12 | Institute of Professional Education and Knowledge, VTC | Legal Knowledge for Life Insurance Selling | 5 (Long Version) | 1 Jun 2019 - 31 May 2020 | 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 –專業彌償保險” 及/或 選修個別單元 “第三單元 –應變保險、僱員忠誠保險、電子商 貿、僱傭行為責任保險” 及/或 選修個別單元 “第四單元 –信貸保險” 及/或 選修個別單元 “第五單元 –保證保險” * | 15 | 1 May 2019 - 30 Apr 2020 | 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 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|---------------------|--|---|-------------------------------------|--|--|---|
| 80/07/14 | 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) "商業保險相關法例"(及/或選修個別單元“商業保險相關法律”及/或“商業保險”及/或“商業保險索償”及/或“營業中斷保單的法律解釋”)* | 15 | 1 Sep 2019 - 31 Aug 2020 | 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 |
| 80/07/16 Renewed | 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》* | 15 | 1 Oct 2019 - 30 Sep 2020 | 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 Renewed | 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)* | 10 | 1 Oct 2019 - 30 Sep 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Hedley Chow 2836 1864 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|----------------------------|--|---|--|--|--|---|
| 80/07/20 Renewed | Institute of Professional Education and Knowledge, VTC | <p>“Statutory Insurance - Employees' Compensation” with Optional Modules of “Mediation & Alternative Dispute Resolution Practice” and/or “A Comparison of Insurance Law Between China and Hong Kong”</p> <p>《強制性保險條列 – 僱員補償》及/或選修個別單元《調解及替代爭議解決方法實務》及/或《中港保險法比較》*</p> | 15 | 1 Oct 2019 - 30 Sep 2020 | <p>In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工</p> | Mr Lau Cheung Wing Eddy 2836 1863 |
| 80/07/26 | Institute of Professional Education and Knowledge, VTC | Law Relating to Asset Protection* | <p>10 (Normal Version)</p> <p>4 (Shorter Version 1)</p> <p>3 (Shorter Version 2)</p> | 1 Mar 2019 – 29 Feb 2020 | <p>Public 公眾人士 + Commissioning Body 委託機構員工</p> | Mr Hedley Chow 2836 1864 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|---|-------------------------------------|--|---|-----------------------------|
| 80/07/27 | Institute of Professional Education and Knowledge, VTC | Duties of Fiduciaries and Criminal Law 受信人責任與刑事法 * | 10 | 1 Sep 2019 - 31 Aug 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Hedley Chow 2836 1864 |
| 80/07/28 | Institute of Professional Education and Knowledge, VTC | Technical Analysis * | 16 | 1 Apr 2019 - 31 Mar 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| 80/07/37 | Institute of Professional Education and Knowledge, VTC | Boost your work competence with NLP 「身心語言程式學」工作坊 * | 16 | 1 Apr 2019 - 31 Mar 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| 80/07/39 | Institute of Professional Education and Knowledge, VTC | Modern Leadership and Staff Management in Insurance Industry 現代保險業的卓越領導 和員工管理 * | 16 | 19 Oct 2018 - 18 Oct 2019 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Flora Chan 2836 1855 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|--|-------------------------------------|--|---|-----------------------------|
| 80/07/41 | Institute of Professional Education and Knowledge, VTC | Health Insurance * | 20 | 1 Jan 2019 - 31 Dec 2019 | Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Hedley Chow 2836 1864 |
| 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* | 8 (Normal Version) | 1 Dec 2018 - 30 Nov 2019 | 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) | | | |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|--|-------------------------------------|--|---|---------------------------|
| 80/07/49 | 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 * | 16 (Long Version) | 1 Sep 2019 - 31 Aug 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| | | | 3 (Shorter Version 1) | | | |
| 80/07/50 | Institute of Professional Education and Knowledge, VTC | 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 * | 15 | 1 Mar 2019 - 29 Feb 2020 | 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 Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|---|-------------------------------------|--|---|-----------------------------|
| 80/07/51 | Institute of Professional Education and Knowledge, VTC | Best Practices for Financial Products Intermediaries 金融產品中介人實務須知* | 16 (Normal Version) | 1 Jan 2019 – 31 Dec 2019 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| | | | 8 (Shorter Version 1) | | | |
| | | | 5 (Shorter Version 2) | | | |
| 80/07/52 | Institute of Professional Education and Knowledge, VTC | Travel Insurance 旅遊保險 * | 12 | 1 Apr 2019 - 31 Mar 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Hedley Chow 2836 1864 |
| 80/07/53 | Institute of Professional Education and Knowledge, VTC | Leadership & Management Techniques for Insurance Industry 保險業之領導與管理技巧 * | 16 | 1 May 2019 - 30 Apr 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Flora Chan 2836 1855 |
| 80/07/55 | Institute of Professional Education and Knowledge, VTC | Advanced Technical Analysis 股市技術分析進階課程 * | 16 | 1 May 2019 - 30 Apr 2020 | 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 Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-----------------------------|---|---|-------------------------------------|--|--|-----------------------------------|
| 80/07/56 | 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 * | 16 (Long Version) | 1 May 2019 - 30 Apr 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| | | | 3 (Shorter Version 1) | | | |
| 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 * | 16 | 1 Sep 2019 - 31 Aug 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| 80/07/58 Renewed | 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 * | 16 | 1 Oct 2019 - 30 Sep 2020 | 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) * | 16 | 1 Jan 2019 - 31 Dec 2019 | 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) * | 16 | 1 Jan 2019 - 31 Dec 2019 | 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 Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|--|-------------------------------------|--|---|---------------------------|
| 80/07/62 | 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) * | 16 | 1 May 2019 - 30 Apr 2020 | 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 * | 16 | 1 Sep 2019 - 31 Aug 2020 | 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 * | 16 | 1 Dec 2018 - 30 Nov 2019 | 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 * | 16 | 1 Feb 2019 - 31 Jan 2020 | 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) * | 13 | 1 Feb 2019 - 31 Jan 2020 | 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 Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-----------------------------|---|--|-------------------------------------|--|--|-----------------------------------|
| 80/07/69 | Institute of Professional Education and Knowledge, VTC | Investing in Commodities Series 商品投資系列 * | 16 | 1 Jun 2019 - 31 May 2020 | 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) 互聯網世代的商機和人事 (金融服務專業人員) * | 16 | 1 Jun 2019 - 31 May 2020 | 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 (金融服務業專才) * | 16 | 1 Sep 2019 - 31 Aug 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| 80/07/72 Renewed | Institute of Professional Education and Knowledge, VTC | Asian Securities Markets 亞洲證券市場 * | 14 | 1 Oct 2019 - 30 Sep 2020 | 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) * | 16 | 1 Nov 2018 - 31 Oct 2019 | 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 Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|---|-------------------------------------|--|---|---------------------------|
| 80/07/75 | Institute of Professional Education and Knowledge, VTC | Know Your Customers' Investment Psychology (客戶投資心理解說) * | 11 | 1 Jan 2019 - 31 Dec 2019 | 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) * | 16 | 1 Jan 2019 - 31 Dec 2019 | 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 * | 18 | 1 Aug 2019 - 31 Jul 2020 | 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 Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|----------------------------|--|---|-------------------------------------|--|---|-----------------------------|
| 80/07/79 | Institute of Professional Education and Knowledge, VTC | Business Ethics in the Finance Sector 商業道德操守(金融業) * | 16 | 1 Aug 2019 - 31 Jul 2020 | 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 * | 8 | 1 Sep 2019 - 31 Aug 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Hedley Chow 2836 1864 |
| 80/07/81 Renewed | Institute of Professional Education and Knowledge, VTC | Enhancing Quality Customer Service 提高優質顧客服務 | 4 (Long Version) | 1 Oct 2019 - 30 Sep 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Hedley Chow 2836 1864 |
| | | | 3 (Shorter Version) | | | |
| 80/07/82 Renewed | Institute of Professional Education and Knowledge, VTC | 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 * | 6 | 1 Oct 2019 - 30 Sep 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| 80/07/83 | Institute of Professional Education and Knowledge, VTC | Strengthening Your Influential Power Course 強化影響力課程 * | 16 | 1 Dec 2018 - 30 Nov 2019 | 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 Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|---|-------------------------------------|--|---|---------------------------|
| 80/07/84 | Institute of Professional Education and Knowledge, VTC | MPF Training Programme 強積金培訓 * | 8 | 1 Jan 2019 - 31 Dec 2019 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| 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 * | 15 | 1 Feb 2019 - 31 Jan 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| 80/07/86 | Institute of Professional Education and Knowledge, VTC | CPD Programs for Travel Insurance Agents 旅遊保險代理持續進修課程 * | 15 | 1 Apr 2019 - 31 Mar 2020 | 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 Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|----------------------------|--|---|-------------------------------------|--|---|----------------------------------|
| 80/07/87 Renewed | 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] * | 17 | 1 Oct 2019 - 30 Sep 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| 80/07/88 Renewed | Institute of Professional Education and Knowledge, VTC | China Real Estate Investment Strategies 中國房地產投資策略 * | 12 | 1 Oct 2019 - 30 Sep 2020 | 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 * | 12 | 1 Dec 2018 - 30 Nov 2019 | 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 Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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* | 6 (Normal Version) | 1 Dec 2018 – 30 Nov 2019 | Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Hedley Chow 2836 1864 |
| | | | 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 * | 16 | 1 Dec 2018 - 30 Nov 2019 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| 80/07/92 Renewed | Institute of Professional Education and Knowledge, VTC | Understanding RMB Internationalization and Financial Instruments 人民幣國際化和金融工具 * | 14 | 1 Nov 2019 - 31 Oct 2020 | 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* | 18.5 (Normal Version) | 1 Dec 2018 – 30 Nov 2019 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| | | | 17 (Shorter Version) | | | |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|---|-------------------------------------|--|---|---------------------------|
| 80/07/94 | Institute of Professional Education and Knowledge, VTC | Customer Experience Management 客戶體驗管理* | 17 (Longer Version) | 1 Jan 2019 – 31 Dec 2019 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| | | | 14 (Shorter Version) | | | |
| 80/07/97 | Institute of Professional Education and Knowledge, VTC | Hong Kong's Future and Retirement Planning Forum 香港未來及退休策劃論壇* | 6 (Normal Version) | 1 Mar 2019 – 29 Feb 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| | | | 4 (Shorter Version) | | | |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|----------------------------|---|---|-------------------------------------|--|--|-----------------------------------|
| 80/07/98 Renewed | Institute of Professional Education and Knowledge, VTC | Advanced Management Skills for Financial Professionals 金融專業管理技巧 (進階課程) * | 23 | 1 Oct 2019 - 30 Sep 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| 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 * | 14 | 1 Sep 2019 - 31 Aug 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| 80/07/100 | Institute of Professional Education and Knowledge, VTC | Customer Complaint Handling Reinforcement Course 客戶投訴處理強化課程 * | 17 (Long Version) | 1 Jun 2019 - 31 May 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| | | | 2 (Shorter Version 1) | | | |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 * | 10 (Longer Version) | 1 Jan 2019 – 31 Dec 2019 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| | | | 7 (Shorter Version) | | | |
| 80/07/102 | Institute of Professional Education and Knowledge, VTC | Common Personal Insurance Claims Disputes | 3 | 1 Apr 2019 - 31 Mar 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Hedley Chow 2836 1864 |
| 80/07/103 | Institute of Professional Education and Knowledge, VTC | Family Laws for Financial Planners | 5 (Normal Version) | 1 Mar 2019 – 29 Feb 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Hedley Chow 2836 1864 |
| | | | 3 (Shorter Version) | | | |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|---|-------------------------------------|--|---|-----------------------------|
| 80/07/105 | Institute of Professional Education and Knowledge, VTC | Development Programme for Team Managers 團隊經理發展課程 * | 10 | 1 Aug 2019 - 31 Jul 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| 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 * | 27 | 1 May 2019 - 30 Apr 2020 | 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) * | 18 | 1 May 2019 - 30 Apr 2020 | 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 * | 15 | 1 Nov 2017 - 31 Oct 2018 | Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Hedley Chow 2836 1864 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-----------------------------|--|---|-------------------------------------|--|---|-----------------------------|
| 80/07/112 Renewed | Institute of Professional Education and Knowledge, VTC | HK & China Investment Outlook Seminar 中港投資展望 * | 8 | 1 Oct 2019 - 30 Sep 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| 80/07/113 | Institute of Professional Education and Knowledge, VTC | Significant Changes to Insurance Industry Regulation (2019)* | 8 (Longer Version) | 1 Feb 2019 – 31 Jan 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Hedley Chow 2836 1864 |
| | | | 5 (Shorter Version) | | | |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|---|-------------------------------------|--|---|-----------------------------|
| 80/07/114 | Institute of Professional Education and Knowledge, VTC | Bankruptcy Laws Relating to Credit Risk and Insurance * | 10 (Long Version) | 1 May 2019 - 30 Apr 2020 | 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 | Institute of Professional Education and Knowledge, VTC | Mainland Contemporary Financial Topics 內地當前財經熱話 * | 32 | 1 Mar 2019 - 29 Feb 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| 80/07/117 | Institute of Professional Education and Knowledge, VTC | Anti-Money Laundering (AML) & Sanctions Compliance Training 反洗黑錢和制裁合規培訓 | 2 | 1 Feb 2019 - 31 Jan 2020 | 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 | 4 | 1 Mar 2019 - 29 Feb 2020 | 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 Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-----------------------------|--|--|-------------------------------------|--|---|-----------------------------|
| 80/07/121 | Institute of Professional Education and Knowledge, VTC | Securities Analysis Approaches That Have Stood The Test Of Time * | 21 | 15 Nov 2018 - 14 Nov 2019 | Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Hedley Chow 2836 1864 |
| 80/07/122 Renewed | Institute of Professional Education and Knowledge, VTC | Global Taxation Overview 環球稅制概覽 * | 8 (Long Version) | 1 Oct 2019 - 30 Sep 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| | | | 6 (Shorter Version) | | | |
| 80/07/123 | Institute of Professional Education and Knowledge, VTC | Mainland-Hong Kong Mutual Recognition of Funds 內地與香港基金互認 * | 5 | 1 Dec 2018 - 30 Nov 2019 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Flora Chan 2836 1855 |
| 80/07/125 | Institute of Professional Education and Knowledge, VTC | Customer Delight 客戶的愉快體驗 * | 8 | 1 Jun 2019 - 31 May 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| 80/07/127 | Institute of Professional Education and Knowledge, VTC | Handling Objections Effectively 有效處理異議 * | 7 | 1 Feb 2019 - 31 Jan 2020 | 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 Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|--|-------------------------------------|--|--|---|
| 80/07/129 | Institute of Professional Education and Knowledge, VTC | Shanghai / Shenzhen - Hong Kong Stock Connect 滬 / 深港通 * | 8 | 1 Apr 2019 - 31 Mar 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Flora Chan 2836 1855 |
| 80/07/130 | Institute of Professional Education and Knowledge, VTC | Essential Technical Insurance knowledge for effective service quality enhancement 優越服務必須掌握的保險知識 * | 24 | 18 Apr 2019 - 17 Apr 2020 | 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 |
| 80/07/131 | Institute of Professional Education and Knowledge, VTC | Product Liability Insurance for Manufacturers and Exporters 產品責任保險 (承保製造商及出口商) * | 5 (Normal Version) | 20 Apr 2019 - 19 Apr 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Hedley Chow 2836 1864 |
| | | | 3 (Shorter Version) | | | |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|---|-------------------------------------|--|---|----------------------------|
| 80/07/132 | Institute of Professional Education and Knowledge, VTC | FinTech & The Finance Industry 金融科技與金融業 * | 11 | 1 Apr 2019 - 31 Jul 2019 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| | | | 14 | 1 Aug 2019 - 31 Mar 2020 | | |
| 80/07/134 | Institute of Professional Education and Knowledge, VTC | Enhancing Interpersonal Relationships – Enneagram 提升人際關係 – 九型人格 * | 7 (Normal Version) | 1 Nov 2018 - 31 Oct 2019 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Flora Chan 2836 1855 |
| | | | 6 (Shorter Version) | | | |
| 80/07/135 | Institute of Professional Education and Knowledge, VTC | Health Management Series 健康管理與養生系列 * | 15 | 1 Dec 2018 - 30 Nov 2019 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| 80/07/136 | Institute of Professional Education and Knowledge, VTC | High Impact Relationship Calling Skills 高效電話聯繫客戶技巧 | 4 | 1 Apr 2019 - 31 Mar 2020 | 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 Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|---|-------------------------------------|--|---|---------------------------|
| 80/07/138 | Institute of Professional Education and Knowledge, VTC | EDRAS In Practice * | 12 | 1 Jan 2019 - 31 Dec 2019 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| 80/07/139 | Institute of Professional Education and Knowledge, VTC | Sales Quality 優質銷售 | 7 | 1 Jan 2019 - 31 Dec 2019 | 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 * | 6 (Normal Version) | 1 Dec 2018 - 30 Nov 2019 | 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) * | 6 | 1 Feb 2019 - 31 Jan 2020 | 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 Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|------------------------------|---|--|-------------------------------------|--|--|-----------------------------------|
| 80/07/142 | Institute of Professional Education and Knowledge, VTC | Cyber Security in Financial Services 金融服務的網絡安全 * | 8 | 25 May 2019 - 24 May 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Flora Chan 2836 1855 |
| 80/07/143 Renewed | Institute of Professional Education and Knowledge, VTC | Electronic Financial Service and Big Data 電子金融服務與大數據 * | 16 | 1 Nov 2019 - 31 Oct 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| 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 * | 23 | 1 Jan 2019 - 31 Dec 2019 | 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 * | 8 | 15 Jan 2019 - 14 Jan 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| 80/07/146 | Institute of Professional Education and Knowledge, VTC | The Cybersecurity Next Frontier 網絡安全的新領域 * | 6 | 1 Apr 2019 - 31 Mar 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Flora Chan 2836 1855 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|---|-------------------------------------|--|---|-----------------------------|
| 80/07/147 | Institute of Professional Education and Knowledge, VTC | How to Live a Healthy Life 如何活得健康 * | 8 | 1 May 2019 - 30 Apr 2020 | 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 * | 6 | 1 May 2019 - 30 Apr 2020 | 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 * | 9 | 1 Jul 2019 - 30 Jun 2020 | 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 * | 10 | 1 Aug 2019 - 31 Jul 2020 | 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 * | 8 | 1 Sep 2019 - 31 Aug 2020 | 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 Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 * | 8 | 1 Sep 2019 - 31 Aug 2020 | 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 * | 8 | 1 Oct 2019 - 30 Sep 2020 | 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 * | 8 | 1 Oct 2019 - 30 Sep 2020 | 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 * | 8 | 1 Oct 2019 - 30 Sep 2020 | 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 * | 8 | 1 Oct 2019 - 30 Sep 2020 | 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 Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------------------|--|---|-------------------------------------|--|---|--|
| 80/07/157 | Institute of Professional Education and Knowledge, VTC | Advanced Technical Analysis – Point & Figure Chart 進階圖表走勢理論 – 點數圖 * | 8 | 1 Oct 2019 - 30 Sep 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| 80/07/158 New | Institute of Professional Education and Knowledge, VTC | Advanced Technical Analysis – Patterns Analysis 進階圖表走勢理論 – 形態分析 * | 8 | 1 Nov 2019 - 31 Oct 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| 80/07/159 New | Institute of Professional Education and Knowledge, VTC | Derivative Financial Instruments 金融衍生工具 * | 16 | 1 Nov 2019 - 31 Oct 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| 80/08/83 | Hang Seng Bank Ltd. | Managing Financial Crime Risk in CMB | 14 | 12 Apr 2019 - 11 Apr 2020 | In-house 內部員工 | Ms Wong Kam Ting Tobie 3662 5309 |
| 80/08/88 | Hang Seng Bank Ltd. | Global Contact Centre Business (GCCB) Soft Skills Training * | 12 | 19 Nov 2018 - 18 Nov 2019 | In-house 內部員工 | Miss Wan Ho Kwan, Carman 3662 5310 |
| 80/08/89 | Hang Seng Bank Ltd. | Sanctions Risks Refreshment | 3 | 4 Dec 2018 - 3 Dec 2019 | In-house 內部員工 | Ms Wong Kam Ting Tobie 3662 5309 |
| 80/08/90 | Hang Seng Bank Ltd. | Trade Finance – Connecting with Customers | 4 | 7 Jan 2019 - 6 Jan 2020 | In-house 內部員工 | Ms Wong Kam Ting Tobie 3662 5309 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------------------------|-------------------------------------|--|-------------------------------------|--|---|---|
| 80/08/91 | Hang Seng Bank Ltd. | Embeddedness Training | 3 | 22 Feb 2019 - 21 Feb 2020 | In-house 內部員工 | Ms Wong Kam Ting Tobie 3662 5309 |
| 80/08/92 | Hang Seng Bank Ltd. | Wealth Management Compliance Updates and Financial Crime Risk 2019 * | 7 | 27 Apr 2019 - 26 Apr 2020 | In-house 內部員工 | Miss Wan Ho Kwan, Carman 3662 5310 |
| 80/08/93 | Hang Seng Bank Ltd. | Branch Opeartion Management Updates 2019 | 3 | 27 Apr 2019 - 26 Apr 2020 | In-house 內部員工 | Miss Wan Ho Kwan, Carman 3662 5310 |
| 80/08/94 | Hang Seng Bank Ltd. | Treat Customer Fairly and Ethical Selling | 3 | 27 Apr 2019 - 26 Apr 2020 | In-house 內部員工 | Miss Wan Ho Kwan, Carman 3662 5310 |
| 80/08/95 | Hang Seng Bank Ltd. | Advanced Financial Planning – Retirement | 3 | 29 Apr 2019 - 28 Apr 2020 | In-house 內部員工 | Miss Wan Ho Kwan, Carman 3662 5310 |
| 80/08/96 | Hang Seng Bank Ltd. | 2019 CPD Programme for PBD * | 6 | 6 Jun 2019 - 5 Jun 2020 | In-house 內部員工 | Miss Wan Ho Kwan, Carman 3662 5310 |
| 80/08/98 New | Hang Seng Bank Ltd. | Trade and Receivables Finance Solutions Walk-through | 4 | 21 Oct 2019 - 20 Oct 2020 | In-house 內部員工 | Ms Wong Kam Ting Tobie 3662 5309 |
| 80/10/16 | FTLife Insurance Company Limited | Intermediary Development Course 保險代理發展課程 * | 16 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 + Commissioning Body 委託機構員工 | Mr Samson Leung 2625 6322 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|-------------------------------------|---|-------------------------------------|--|--|------------------------------|
| 80/10/17 | FTLife Insurance Company Limited | Management Enhancement Program 管理深造課程 * | 16 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 + Commissioning Body 委託機構員工 | Mr Samson Leung 2625 6322 |
| 80/10/20 | FTLife Insurance Company Limited | Agent Personal Development Workshop - DISC Series 保險代理個人發展工作坊 - DISC系列 * | 8 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 + Commissioning Body 委託機構員工 | Mr Samson Leung 2625 6322 |
| 80/10/24 | FTLife Insurance Company Limited | Career Presentation Workshop 專業發展機會介紹工作坊 | 6 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 | Mr Samson Leung 2625 6322 |
| 80/10/29 | FTLife Insurance Company Limited | Understanding China Tax Reform 認識中國稅務改革 | 2 | 11 Feb 2019 - 10 Feb 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers and IFAs | Mr Henry Hsu 2625 6383 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|-------------------------------------|---|-------------------------------------|--|--|-----------------------------|
| 80/10/30 | FTLife Insurance Company Limited | The Practical Aspect of CRS in Financial Planning 共同匯報標準應用培訓課程 | 2 | 11 Feb 2019 - 10 Feb 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers and IFAs | Mr Henry Hsu 2625 6383 |
| 80/10/31 | FTLife Insurance Company Limited | Tax Planning and Asset Allocation of High Net Worth in China 高淨值客戶稅收籌劃及 資產配置攻略 | 3 | 18 Mar 2019 - 17 Mar 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers and IFAs | Mr Steve Yu 2625 6321 |
| 80/10/32 | FTLife Insurance Company Limited | Medical and CI Knowledge Booster 危疾醫療多面睇 * | 4 | 1 Apr 2019 - 31 Mar 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers and IFAs | Miss Astor Lau 2625 6332 |
| 80/10/33 | FTLife Insurance Company Limited | Recruitment Skill Workshop 優才入富招募技巧工作坊 | 6 | 8 Mar 2019 - 7 Mar 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 | Miss Gorly Ha 2625 6303 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|-------------------------------------|--|-------------------------------------|--|--|-----------------------------|
| 80/10/34 | FTLife Insurance Company Limited | New Trend of Insurance Market 保險市場新趨勢 * | 2 | 2 May 2019 - 1 May 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers and IFAs | Miss Astor Lau 2625 6332 |
| 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 | 2 | 6 May 2019 - 5 May 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers and IFAs | 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 * | 24 | 14 May 2019 - 13 May 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 | Miss Gorly Ha 2625 6303 |
| 80/10/37 | FTLife Insurance Company Limited | Financial Planning in Marriage 婚姻財富規劃 * | 6 | 7 Jun 2019 - 6 Jun 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: IFA and Brokers | Mr Henry Hsu 2625 6383 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|----------------------------------|---|-------------------------------------|--|--|----------------------------|
| 80/10/38 | 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) * | 10 | 14 Jun 2019 - 13 Jun 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: IFA and Brokers | Mr Roger Kwok 2625 6324 |
| 80/10/39 | FTLife Insurance Company Limited | FTLife Financial Planning Advisor Basic Program 富通財富顧問基礎課程 * | 10 | 20 Jun 2019 - 19 Jun 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: IFAs and Brokers | Mr Sky Iu 2625 6334 |
| 80/10/40 | FTLife Insurance Company Limited | Success Code Workshop 成功密碼工作坊 | 4 | 20 Jun 2019 - 19 Jun 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: IFAs and Brokers | Mr Steve Yu 2625 6321 |
| 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 I * | 9 | 16 Jul 2019 - 15 Jul 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: IFAs and Brokers | Mr Roger Kwok 2625 6324 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------------------------|---|---|-------------------------------------|--|---|--------------------------------------|
| 80/10/42 | FTLife Insurance Company Limited | FOCUS: Target Recruitment Workshop 定焦攻略: 目標市場招募法 * | 6 | 2 Sep 2019 - 1 Sep 2020 | 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 * | 12 | 2 Sep 2019 - 1 Sep 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: IFAs and Brokers | Miss Gorly Ha 2625 6303 |
| 80/10/44 New | FTLife Insurance Company Limited | Future Star Club Training Series II 明日之星同學會培訓 課程系列二 * | 15 | 2 Oct 2019 - 1 Oct 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: IFAs and Brokers | Mr Sky Iu 2625 6334 |
| 80/11/09 | Sun Life Hong Kong Limited | Compliance Workshop * | 5 | 1 May 2019 - 30 Apr 2020 | In-house 內部員工 + Others: Business Partner | Mr Thomas Kwan 3183 2582 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-----------------------------|-----------------------------|--|-------------------------------------|--|---|---|
| 80/11/15 | Sun Life Hong Kong Limited | Practical Investment Training Series 投資實務研習坊 * | 6 | 21 May 2019 - 20 May 2020 | In-house 內部員工 + Others: Distribution Channel Members including Agency members and Brokers | Mr Thomas Kwan 3183 2582 |
| 80/11/16 | Sun Life Hong Kong Limited | Retirement and Estate Planning Workshop | 3 | 11 Jun 2019 - 10 Jun 2020 | In-house 內部員工 + Others: All distribution channel members such as agents and brokers | Mr Thomas Kwan 3183 2582 |
| 80/11/17 | Sun Life Hong Kong Limited | Getting Referral Workshop - Sales | 3 | 16 Jul 2019 - 15 Jul 2020 | In-house 內部員工 + Others: Members of Agency Channel & Partnership Distribution Channel | Miss Cheung Wing Yin Flora 3183 2576 |
| 80/11/18 Renewed | Sun Life Hong Kong Limited | Workshop for Employer Scheme Selling 僱主計劃銷售培訓 | 2 | 18 Sep 2019 - 17 Sep 2020 | 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 | 3 | 8 Mar 2019 - 7 Mar 2020 | In-house 內部員工 + Others: Members of Agency Channel & Partnership Distribution Channel | Mr Thomas Kwan 3183 2582 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|---|-------------------------------------|--|--|--|
| 80/11/21 | Sun Life Hong Kong Limited | Cross Selling Sales Workshop | 3 | 1 Apr 2019 - 31 Mar 2020 | In-house 內部員工 + Others: Members of Agency Channel & Partnership Distribution Channel | Mr Thomas Kwan 3183 2582 |
| 80/11/22 | Sun Life Hong Kong Limited | Investment Linked Sales Workshop | 3 | 18 Apr 2019 - 17 Apr 2020 | In-house 內部員工 + Others: Members of Agency Channel & Partnership Distribution Channel | Mr Thomas Kwan 3183 2582 |
| 80/11/23 | Sun Life Hong Kong Limited | Recruiting BGA Skills Workshop | 3 | 2 Sep 2019 - 1 Sep 2020 | In-house 內部員工 + Others: Members of Agency Channel & Partnership Distribution Channel | Miss Cheung Wing Yin Flora 3183 2576 |
| 80/15/22 | The Hong Kong and Shanghai Banking Corporation Limited | HK Investment Knowledge & Drilling * | 8 | 1 Jul 2019 - 30 Jun 2020 | 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 2019 | 3 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 | Ms Leung Yu Man Manthy 2284 1779 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|--|-------------------------------------|--|---|-------------------------------------|
| 80/15/53 | The Hong Kong and Shanghai Banking Corporation Limited | Sales Quality Updates and Review 2019 | 3 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 | Ms Leung Yu Man Manthy 2284 1779 |
| 80/15/65 | The Hong Kong and Shanghai Banking Corporation Limited | Digital Banking and Customer Service Excellence | 3 | 30 Nov 2018 - 29 Nov 2019 | In-house 內部員工 | Ms Leung Yu Man Manthy 2284 1779 |
| 80/15/66 | The Hong Kong and Shanghai Banking Corporation Limited | Ethics at Work (Leader Version) | 4 | 30 Nov 2018 - 29 Nov 2019 | In-house 內部員工 | Ms Leung Yu Man Manthy 2284 1779 |
| 80/15/67 | The Hong Kong and Shanghai Banking Corporation Limited | Ethics at Work (Staff Version) | 4 | 30 Nov 2018 - 29 Nov 2019 | In-house 內部員工 | Ms Leung Yu Man Manthy 2284 1779 |
| 80/17/15 | Manulife (International) Limited | Financial Planning Development Program (FPDP): Module 4 – Comprehensive Financial Planning | 10 | 1 Apr 2019 - 31 Mar 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 | Miss S Y Mandy Kwok 2919 3425 |
| 80/17/22 | Manulife (International) Limited | MOA Initial Training Course * | 35 | 1 Dec 2018 - 30 Nov 2019 | Others: Contracted Insurance Advisors | Ms Mandy Kwok 2919 3425 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|-------------------------------------|--|-------------------------------------|--|--|-----------------------------|
| 80/17/23 | Manulife (International) Limited | An Understanding of the ECA Legislation, Enhanced Regulation and Conduct Requirements of MPF Intermediaries | 3 | 1 Aug 2019 - 31 Jul 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Contracted Agents | Mr Terence Tam 2510 5684 |
| 80/17/25 | Manulife (International) Limited | Investment-Linked Long Term Insurance Examination Preparation Course * | 10 | 1 Aug 2019 - 31 Jul 2020 | In-house 內部員工 | Ms Mandy Kwok 2919 3425 |
| 80/17/30 | Manulife (International) Limited | MPF Market Updates and Complaint Cases Study | 2 | 13 Dec 2018 - 12 Dec 2019 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Contracted Agents | Mr Terence Tam 2510 5684 |
| 80/17/31 | Manulife (International) Limited | Investment Basics and MPF Investments Training for MPF Intermediaries | 2 | 13 Dec 2018 - 12 Dec 2019 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Contracted Agents | Mr Terence Tam 2510 5684 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--------------------------------------|---|-------------------------------------|--|--|---|
| 80/17/32 | Manulife (International) Limited | MOA Development Course 經理發展課程 * | 24 | 1 Jan 2019 - 31 Dec 2019 | Others: Contracted insurance advisors | Ms Mandy Kwok 2919 3425 |
| 80/17/34 | Manulife (International) Limited | Conduct of MPF Intermediaries and Development of the MPF System 強積金中介人操守及 強積金制度發展 | 2 | 19 Nov 2018 - 18 Nov 2019 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Contracted Agents | Mr Terence Tam 2510 5684 |
| 80/17/35 | Manulife (International) Limited | Tax Deductible Voluntary Contributions Training for MPF Intermediaries 「可扣稅自願性供款」 強積金中介人培訓 | 2 | 15 Jul 2019 - 14 Jul 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Contracted Agents | Mr Terence Tam 2510 5684 |
| 80/20/07 | Convoy Financial Services Limited | 強積金中介人考試精讀班 | 6 | 13 May 2019 - 12 May 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 | Miss Cheung Yuk Yu, Metis 3601 2338 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|-----------------------------------|---|-------------------------------------|--|---|---|
| 80/20/11 | Convoy Financial Services 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〉* | 8 | 25 Mar 2019 - 24 Mar 2020 | In-house 內部員工 | Miss Cheung Yuk Yu, Metis 3601 2338 |
| 80/20/12 | Convoy Financial Services 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 〈試卷七：金融市場〉* | 8 | 25 Apr 2019 - 24 Apr 2020 | In-house 內部員工 | Miss Cheung Yuk Yu, Metis 3601 2338 |
| 80/20/13 | Convoy Financial Services 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>* | 8 | 28 May 2019 - 27 May 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 | Miss Cheung Yuk Yu, Metis 3601 2338 |
| 80/20/22 | Convoy Financial Services 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」 | 2 | 1 Apr 2019 - 31 Mar 2020 | In-house 內部員工 | Miss Cheung Yuk Yu, Metis 3601 2338 |
| 80/20/29 | Convoy Financial Services 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 | 3 | 27 Mar 2019 - 26 Mar 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 | Miss Cheung Yuk Yu, Metis 3601 2338 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------------------------|--|---|-------------------------------------|--|--|--|
| 80/20/30 | Convoy Financial Services 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 | 2 | 24 May 2019 - 23 May 2020 | In-house 內部員工 | Miss Cheung Yuk Yu, Metis 3601 2338 |
| 80/20/31 New | Convoy Financial Services Limited | Fast Start Training 新管理財顧問培訓課程 | 8 | 16 Sep 2019 - 15 Sep 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 | Miss Cheung Yuk Yu, Metis 3601 2338 |
| 80/22/17 | MSIG Insurance (Hong Kong) Limited | Impact of VHIS and Healthcare product trend, Terrorism security services case sharing, PLUS Law and regulations in relation to property construction works in Hong Kong | 5 | 10 Oct 2018 - 9 Oct 2019 | In-house 內部員工 + Others: Internal Staff & Intermediaires | Miss Nicole Fong 2894 0846 |
| 80/23/27 | Sun Life Hong Kong Limited | Target Market Recruiting Workshop | 3 | 6 Mar 2019 - 5 Mar 2020 | In-house 內部員工 + Others: Members of Agency Channel & Partnership Distribution Channel | Mr Thomas Kwan 3183 2582 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|--|-------------------------------------|--|--|--|
| 80/23/29 | Sun Life Hong Kong Limited | Recruitment & Retention Series * | 6 | 8 Feb 2019 - 7 Feb 2020 | In-house 內部員工 + Others: Members of Agency Channel & Partnership Distribution Channel | Mr Thomas Kwan 3183 2582 |
| 80/23/30 | Sun Life Hong Kong Limited | MPFA TVC Training [可扣稅自願性供款] 強積金中介人培訓 | 2 | 9 Sep 2019 - 8 Sep 2020 | In-house 內部員工 + Others: Members of Agency Channel & Partnership Distribution Channel | Miss Cheung Wing Yin Flora 3183 2576 |
| 80/24/56 | Institute for Entrepreneurship (IfE), The Hong Kong Polytechnic University | 2019 Market Updates for Financial Practitioners * | 6 | 27 Feb 2019 - 26 Feb 2020 | Public 公眾人士 | Mrs Karen Kirby Wong 3400 2763 |
| 80/24/57 | Institute for Entrepreneurship (IfE), The Hong Kong Polytechnic University | Market Updates for Insurance Professional 2019 * | 10 | 12 Mar 2019 - 11 Mar 2020 | Public 公眾人士 | Mrs Wong Karen Kirby 3400 2763 |
| 80/24/58 | Institute for Entrepreneurship (IfE), The Hong Kong Polytechnic University | 2019 Market Updates (MPF TVCs Updates, FinTech and Wealth Management) for Insurance Intermediaries and Bank Practitioners * | 6 | 17 Apr 2019 - 16 Apr 2020 | Public 公眾人士 | Mrs Wong Karen Kirby 3400 2763 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-----------------------------|---|---|-------------------------------------|--|---|--------------------------------------|
| 80/25/26 Renewed | Chubb Life Insurance Company Limited | Financial Planning Training Series 財務策劃培訓系列 * | 12 | 10 Oct 2019 - 9 Oct 2020 | In-house 內部員工 | Mr Wong Pak Yin 2837 7153 |
| 80/28/03 | BUPA (Asia) Ltd | Building a High Performance Team Series 建立高績效團隊系列 * | 9 | 28 Jan 2019 - 27 Jan 2020 | In-house 內部員工 | Mr Joe Lee 2975 2600 |
| 80/28/04 | BUPA (Asia) Ltd | Culture@Work series * | 7 | 6 Aug 2019 - 5 Aug 2020 | In-house 內部員工 | Mr Joe Lee 2975 2600 |
| 80/29/02 | AXA China Region Insurance Company Limited | QEP5: Investment-Linked Long Term Exam Preparatory Class | 13 | 1 Jul 2019 - 30 Jun 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 | Mr Samuel Sin 3586 3220 |
| 80/29/16 | AXA China Region Insurance Company Limited | AXA IANG Induction Program AXA 非本地畢業生基礎課程 | 27 | 4 Feb 2019 - 3 Feb 2020 | In-house 內部員工 | Miss Vida Lai 3586 3204 |
| 80/31/71 Renewed | Prudential Hong Kong Limited | Health & Protection Selling 健康保障銷售 | 4 | 6 Sep 2019 - 5 Sep 2020 | In-house 內部員工 | Mr Ricky Li 2977 8342 |
| 80/31/72 Renewed | Prudential Hong Kong Limited | Essentials for Professional Financial Consultants 專業理財顧問基礎課程 | 4 | 11 Sep 2019 - 10 Sep 2020 | In-house 內部員工 | Mr Ricky Li 2977 8342 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-----------------------------|---|--|-------------------------------------|--|----------------------------|----------------------------------|
| 80/31/73 Renewed | Prudential Hong Kong Limited | Fundamental Selling Skills 銷售基本功 | 4 | 6 Sep 2019 - 5 Sep 2020 | In-house 內部員工 | Mr Ricky Li 2977 8342 |
| 80/31/74 | Prudential Hong Kong Limited | Healthy Life Series 健康人生系列 * | 8 | 21 Jan 2019 - 20 Jan 2020 | In-house 內部員工 | Mrs Carrie Lee 2977 8372 |
| 80/31/76 | Prudential Hong Kong Limited | Introduction to Financial Planning 財務策劃簡介 | 5 | 29 Oct 2018 - 28 Oct 2019 | In-house 內部員工 | Miss Ruth Tam 2977 8341 |
| 80/31/77 | Prudential Hong Kong Limited | 金錢的創造力 | 2 | 11 Mar 2019 - 10 Mar 2020 | In-house 內部員工 | Mrs Carrie Lee 2977 8372 |
| 80/31/78 | Prudential Hong Kong Limited | Selling Skills Enrichment Program | 6 | 24 Apr 2019 - 23 Apr 2020 | 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 * | 9 | 25 Apr 2019 - 24 Apr 2020 | In-house 內部員工 | Miss Bonnie Pang 2977 4902 |
| 80/31/80 | Prudential Hong Kong Limited | To be an Effective Manager Series 成為高效能經理系列 * | 15 | 25 Apr 2019 - 24 Apr 2020 | In-house 內部員工 | Mr Jonathan Leung 3722 5732 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-----------------------------|------------------------------|---|-------------------------------------|--|----------------------------|----------------------------------|
| 80/31/88 | Prudential Hong Kong Limited | Selling Skill 3 – Build Up Your Referral Network 銷售技巧 3 – 吸引轉介紹的不二之法 | 2 | 2 Oct 2018 - 1 Oct 2019 | In-house 內部員工 | Mrs Carrie Lee 2977 8372 |
| 80/31/89 | Prudential Hong Kong Limited | Will and Insurance 遺囑與保險 | 2 | 11 Dec 2018 - 10 Dec 2019 | In-house 內部員工 | Mrs Carrie Lee 2977 8372 |
| 80/31/90 | Prudential Hong Kong Limited | Trust and Insurance 信託與保險 | 2 | 7 Jan 2019 - 6 Jan 2020 | In-house 內部員工 | Mrs Carrie Lee 2977 8372 |
| 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 | 2 | 8 Apr 2019 - 7 Apr 2020 | In-house 內部員工 | Mrs Carrie Lee 2977 8372 |
| 80/31/92 | Prudential Hong Kong Limited | 內地稅法及其痛點與保險規劃 | 2 | 27 Aug 2019 - 26 Aug 2020 | In-house 內部員工 | Mrs Carrie Lee 2977 8372 |
| 80/33/12 Renewed | Aon Hong Kong Ltd | Errors & Omissions (E&O) * | 5.5 | 24 Sep 2019 - 23 Sep 2020 | In-house 內部員工 | Ms Anne Lau 2861 6519 |
| 80/33/51 | Aon Hong Kong Ltd | Construction Insurance | 2 | 10 Apr 2019 - 9 Apr 2020 | In-house 內部員工 | Ms Anne Lau 2861 6519 |
| 80/33/56 | Aon Hong Kong Ltd | Agile Leadership – To cope with business challenges in Insurance Industry | 10 | 25 Feb 2019 - 24 Feb 2020 | In-house 內部員工 | Ms Anne Lau 2861 6519 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|--|-------------------------------------|--|---|------------------------------|
| 80/33/57 | Aon Hong Kong Ltd | Personal Effectiveness Series Plus for Insurance Professionals * | 8 | 8 Apr 2019 - 7 Apr 2020 | In-house 內部員工 | Ms Anne Lau 2861 6519 |
| 80/33/58 | Aon Hong Kong Ltd | Change Management for Insurance Professionals * | 10.5 | 1 May 2019 - 30 Apr 2020 | In-house 內部員工 | Ms Anne Lau 2861 6519 |
| 80/33/59 | Aon Hong Kong Ltd | Client Promise for Insurance Professionals * | 13 | 8 Apr 2019 - 7 Apr 2020 | In-house 內部員工 | Ms Anne Lau 2861 6519 |
| 80/33/60 | Aon Hong Kong Ltd | Reinsurance Solutions Annual CPD Conference 2019 – Own Your Career as an Insurance Professional through Impact Model | 10 | 2 May 2019 - 1 May 2020 | In-house 內部員工 | Ms Anne Lau 2861 6519 |
| 80/33/61 | Aon Hong Kong Ltd | Managing Difficult Client | 7 | 1 Sep 2019 - 31 Aug 2020 | In-house 內部員工 | Ms Anne Lau 2861 6519 |
| 80/37/02 | Standard Academy of Insurance & Management Ltd | Employee Compensation Ordinance * | 5 | 1 Sep 2019 - 31 Aug 2020 | 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 * | 5 | 1 Sep 2019 - 31 Aug 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Dr Raymond Chow 2523 6350 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-----------------------------|---|--|-------------------------------------|--|--|--------------------------------------|
| 80/37/04 | Standard Academy of Insurance & Management Ltd | 28 Insurance Traps an insurance intermediary has to know * | 5 | 1 Aug 2019 - 31 Jul 2020 | 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 * | 10 | 1 Aug 2019 - 31 Jul 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Dr Raymond Chow 2523 6350 |
| 80/37/06 Renewed | Standard Academy of Insurance & Management Ltd | Sale Made Simple - Popular Insurance Series No. 1 * | 10 | 1 Nov 2019 - 31 Oct 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Dr Raymond Chow 2523 6350 |
| 80/37/07 | Standard Academy of Insurance & Management Ltd | Sale Made Easy Series * | 20 | 1 Dec 2018 - 30 Nov 2019 | 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 * | 20 | 1 Aug 2019 - 31 Jul 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Dr Raymond Chow 2523 6350 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|---|-------------------------------------|--|---|------------------------------|
| 80/37/09 | Standard Academy of Insurance & Management Ltd | Career and Job Management Series * | 15 | 1 Feb 2019 - 31 Jan 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Dr Raymond Chow 2523 6350 |
| 80/37/10 | 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 * | 7 | 1 May 2019 - 30 Apr 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Dr Raymond Chow 2523 6350 |
| 80/37/11 | Standard Academy of Insurance & Management Ltd | 32 Actual Insurance Claims Complaint an Insurance Intermediary cannot Miss or Ignore * | 5 | 1 May 2019 - 30 Apr 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Dr Raymond Chow 2523 6350 |
| 80/37/12 | Standard Academy of Insurance & Management Ltd | Business Interruption Insurance, Fidelity Guarantee and Surety Bond * | 5 | 1 May 2019 - 30 Apr 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Dr Raymond Chow 2523 6350 |
| 80/37/14 | Standard Academy of Insurance & Management Ltd | Corporate and Personal Branding Management in Insurance Industry * | 5 | 1 Apr 2019 - 31 Mar 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Dr Raymond Chow 2523 6350 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|---|-------------------------------------|--|---|------------------------------|
| 80/37/16 | Standard Academy of Insurance & Management Ltd | 80 Insurance Clauses and Warranties an Insurance Intermediary has to understand * | 5 | 1 Oct 2019 - 30 Sep 2020 | 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 * | 8 | 1 Oct 2019 - 30 Sep 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Dr Raymond Chow 2523 6350 |
| 80/37/18 | Standard Academy of Insurance & Management Ltd | Risk Management * | 5 | 1 Mar 2019 - 29 Feb 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Dr Raymond Chow 2523 6350 |
| 80/37/19 | Standard Academy of Insurance & Management Ltd | Top Twenty Management Models (Conceptual Tools) - Most Effective and Useful Shortcut Guide for Successful Managers * | 5 | 1 Sep 2019 - 31 Aug 2020 | 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 * | 5 | 1 Sep 2019 - 31 Aug 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Dr Raymond Chow 2523 6350 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|--|-------------------------------------|--|---|------------------------------|
| 80/37/22 | Standard Academy of Insurance & Management Ltd | Historical Evolution of Management Thoughts – Twelve Evergreen Greatest Management Thoughts with Application in Insurance * | 5 | 1 Sep 2019 - 31 Aug 2020 | 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 * | 5 | 1 Aug 2019 - 31 Jul 2020 | 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 * | 5 | 1 Feb 2019 - 31 Jan 2020 | 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) * | 5 | 1 Aug 2019 - 31 Jul 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Dr Raymond Chow 2523 6350 |
| 80/37/26 | Standard Academy of Insurance & Management Ltd | Career Self-Management * | 5 | 1 Sep 2019 - 31 Aug 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Dr Raymond Chow 2523 6350 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|---|-------------------------------------|--|---|------------------------------|
| 80/37/27 | Standard Academy of Insurance & Management Ltd | Effective Leadership * | 5 | 1 Apr 2019 - 31 Mar 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Dr Raymond Chow 2523 6350 |
| 80/37/28 | Standard Academy of Insurance & Management Ltd | Marine Insurance - Professional Level Series * | 15 | 1 Mar 2019 - 29 Feb 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Dr Raymond Chow 2523 6350 |
| 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 * | 5 | 1 Apr 2019 - 31 Mar 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Dr Raymond Chow 2523 6350 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|---|-------------------------------------|--|--|------------------------------|
| 80/37/30 | 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 * | 10 | 1 Mar 2019 - 29 Feb 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Dr Raymond Chow 2523 6350 |
| 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 * | 10 | 1 Apr 2019 - 31 Mar 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Dr Raymond Chow 2523 6350 |
| 80/38/02 | The Chartered Insurance Institute Hong Kong Limited | "Legal Series" Seminar for Insurance Intermediaries * | 32 | 1 Nov 2018 - 31 Oct 2019 | In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Sisi Laksono 2520 0098 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|---|-------------------------------------|--|--|------------------------------|
| 80/38/22 | The Chartered Insurance Institute Hong Kong Limited | Building Core Knowledge Seminar for Insurance Intermediaries * | 8 | 1 Feb 2019 - 31 Jan 2020 | In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Sisi Laksono 2520 0098 |
| 80/38/23 | The Chartered Insurance Institute Hong Kong Limited | Digital and Innovation Seminar for Insurance Intermediaries * | 8 | 1 Sep 2019 - 31 Aug 2020 | 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 * | 8 | 27 Jun 2019 - 26 Jun 2020 | In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Sisi Laksono 2520 0098 |
| 80/40/04 | Hong Kong Life Insurance Limited | Life Stages – Effective Insurance Selling Skills Workshop | 4 | 1 Aug 2019 - 31 Jul 2020 | In-house 內部員工 | Ms Ivy Lai 2290 2717 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|--|-------------------------------------|--|--|------------------------------|
| 80/40/06 | Hong Kong Life Insurance Limited | Life Operations - Underwriting & Policy Administration * | 5 | 1 Sep 2019 - 31 Aug 2020 | In-house 內部員工 | Mrs Ivy Lai 2290 2717 |
| 80/40/12 | Hong Kong Life Insurance Limited | Consultative Selling Workshop * | 12 | 25 Feb 2019 - 24 Feb 2020 | In-house 內部員工 | Mrs Ivy Lai 2290 2727 |
| 80/41/18 | Institute of Professional Education and Knowledge (PEAK) of the VTC & General Agents and Managers Association of Hong Kong Limited (GAMAHK) | CPD Seminar 2019 * | 10 | 1 Feb 2019 - 31 Jan 2020 | In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Polly Tam 2836 1822 |
| 80/45/06 | 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) | 10 | 13 May 2019 - 12 May 2020 | 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) | 10 | 13 May 2019 - 12 May 2020 | Public 公眾人士 | Dr Wong Chi Mei 2715 6671 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|---|-------------------------------------|--|----------------------------|------------------------------|
| 80/45/08 | 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) | 10 | 13 May 2019 - 12 May 2020 | 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) | 11 | 13 May 2019 - 12 May 2020 | 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) | 11 | 16 May 2019 - 15 May 2020 | Public 公眾人士 | Dr Wong Chi Mei 2715 6671 |
| 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) | 10 | 16 May 2019 - 15 May 2020 | 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) | 10 | 16 May 2019 - 15 May 2020 | 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 | 10 | 1 Sep 2019 - 31 Aug 2020 | Public 公眾人士 | Dr Wong Chi Mei 2715 6671 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|---|-------------------------------------|--|----------------------------|------------------------------|
| 80/45/24 | The Hong Kong Federation of Trade Unions Occupational Retraining Centre | Insurance and electronic money 保險與電子幣 | 5 | 1 Nov 2018 - 31 Oct 2019 | 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 | 5 | 1 Nov 2018 - 31 Oct 2019 | 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) * | 10 | 23 Apr 2019 - 22 Apr 2020 | 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) | 10 | 23 Apr 2019 - 22 Apr 2020 | 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) * | 10 | 23 Apr 2019 - 22 Apr 2020 | Public 公眾人士 | Dr Wong Chi Mei 2715 6671 |
| 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 基礎證書 (兼讀制) * | 10 | 23 Apr 2019 - 22 Apr 2020 | Public 公眾人士 | Dr Wong Chi Mei 2715 6671 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-----------------------------|---|---|-------------------------------------|--|--|----------------------------------|
| 80/52/02 | Old Mutual International Isle of Man Limited | Legal Aspects of Financial Planning in Hong Kong | 1 | 2 Nov 2018 - 1 Nov 2019 | In-house 內部員工 + Commissioning Body 委託機構員工 | Mr Craig So 3552 5898 |
| 80/52/03 Renewed | Old Mutual International Isle of Man Limited | Essentials of Running a Financial Planning Practice * | 7.5 | 2 Nov 2019 - 1 Nov 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 | Mr Craig So 3552 5898 |
| 80/52/05 | Old Mutual International Isle of Man Limited | UK Inheritance Tax Planning through Use of Trusts | 2 | 2 Nov 2018 - 1 Nov 2019 | In-house 內部員工 + Commissioning Body 委託機構員工 | Mr Craig So 3552 5898 |
| 80/52/06 | Old Mutual International Isle of Man Limited | Dealing through Portfolio Bonds | 2 | 2 Nov 2018 - 1 Nov 2019 | In-house 內部員工 + Commissioning Body 委託機構員工 | Mr Craig So 3552 5898 |
| 80/52/09 | Old Mutual International Isle of Man Limited | Qualifying Recognised Overseas Pension Scheme (QROPS) – Implication to expatriate policyholders | 1.5 | 22 Feb 2019 - 21 Feb 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 | Mr Craig So 3552 5898 |
| 80/52/11 | Old Mutual International Isle of Man Limited | Insurance Intermediaries Training Series - Financial Planning and Trust | 1 | 16 Nov 2018 - 15 Nov 2019 | In-house 內部員工 + Commissioning Body 委託機構員工 | Mr Craig So 3552 5898 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|---|-------------------------------------|--|--|------------------------------|
| 80/52/13 | Old Mutual International Isle of Man Limited | Future Fit - A blueprint for your business * | 7 | 7 Jun 2019 - 6 Jun 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 | Mr Craig So 3552 5898 |
| 80/59/11 | The Life Underwriters Association of Hong Kong Limited | Chartered Life Practitioner Program: Insurance & Financial Planning Market Exploration * | 24 | 12 Jun 2019 - 11 Jun 2020 | In-house 內部員工 | Miss Angel Yuen 2969 0233 |
| 80/59/14 | The Life Underwriters Association of Hong Kong Limited | Chartered Life Practitioner Program: Professional Growth in Insurance & Financial Planning Field (PG) 壽險理財專業發展 * | 24 | 12 Jun 2019 - 11 Jun 2020 | Others: Members of LUAHK | Miss Angel Yuen 2969 0233 |
| 80/59/15 | The Life Underwriters Association of Hong Kong Limited | Workshop for how to write a financial plan 保協「理財策劃計劃書」實踐工作坊 | 3 | 12 Apr 2019 - 11 Apr 2020 | Public 公眾人士 | Miss Angel Yuen 2969 0233 |
| 80/59/17 | The Life Underwriters Association of Hong Kong Limited | 2019 CPD Seminar on Finance and Legal Knowledge For Insurance Practitioners in Hong Kong 2019 保險從業員之財務及法律知識講座 * | 7 | 15 Apr 2019 - 14 Apr 2020 | Public 公眾人士 | Ms Angela Cheng 2969 0244 |
| 80/59/18 | The Life Underwriters Association of Hong Kong Limited | 「財商入屋」計劃之認識金錢的價值與電子貨幣及制作預算 | 4 | 1 Jun 2019 - 31 May 2020 | Others: Members of the Life Underwriters Association of Hong Kong Limited | Miss Angel Yuen 2969 0233 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|---|-------------------------------------|--|--|-------------------------------|
| 80/67/09 | Jardine Lloyd Thompson Limited | E&O Awareness Training * | 8 | 6 Feb 2019 - 5 Feb 2020 | In-house 內部員工 | Ms Lizanne Lee 2864 5584 |
| 80/68/28 | Friends Provident International Limited | Introduction to Protection Needs | 1 | 20 Dec 2018 - 19 Dec 2019 | Others: Insurance brokers | Ms Yuko Kawawada 2918 7039 |
| 80/68/29 | Friends Provident International Limited | The Effect of Residence & Domicile on UK Taxes * | 3 | 22 Dec 2018 - 21 Dec 2019 | Others: Business Partners | Ms Yuko Kawawada 2918 7039 |
| 80/68/32 | Friends Provident International Limited | Trust & Estate Planning | 1.5 | 20 Dec 2018 - 19 Dec 2019 | Others: Business Partners | Ms Yuko Kawawada 2918 7039 |
| 80/68/33 | Friends Provident International Limited | UK Expatriate Tax Planning Using Insurance Solutions | 1.5 | 20 Dec 2018 - 19 Dec 2019 | Others: Business Partners | Ms Yuko Kawawada 2918 7039 |
| 80/74/06 | The Hong Kong Institute of Bankers | Financial Planning Foundation Program * | 40 | 1 Apr 2019 - 31 Mar 2020 | In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 + Others: Insurance Brokers | Miss Karina Tam 2190 7023 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|------------------------------------|---|-------------------------------------|--|--|------------------------------|
| 80/74/14 | The Hong Kong Institute of Bankers | Risk Management and Investment Services for Corporate Client * | 24 | 1 Sep 2019 - 31 Aug 2020 | In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 + Others: Insurance Brokers | Miss Karina Tam 2190 7023 |
| 80/74/18 | The Hong Kong Institute of Bankers | Banking Services & Relationship Management for Corporate Client * | 14 | 29 Jan 2019 - 28 Jan 2020 | In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 + Others: Insurance Brokers | Miss Karina Tam 2190 7023 |
| 80/74/20 | The Hong Kong Institute of Bankers | Mainland Business Environment Program 中國經濟及金融業務課程 * | 13 | 1 Mar 2019 - 29 Feb 2020 | In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 + Others: Insurance brokers | Miss Karina Tam 2190 7023 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|------------------------------------|---|-------------------------------------|--|--|------------------------------|
| 80/74/23 | The Hong Kong Institute of Bankers | Financial System and Risk Management * | 8 | 1 Jun 2019 - 31 May 2020 | In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 + Others: Insurance Brokers | Miss Karina Tam 2190 7023 |
| 80/74/24 | The Hong Kong Institute of Bankers | Banking Services and Professional Ethics * | 8 | 28 Apr 2019 - 27 Apr 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 + Others: Insurance Brokers | Miss Karina Tam 2190 7023 |
| 80/74/25 | The Hong Kong Institute of Bankers | Fundamentals of Accounting and Law in Banking * | 8 | 1 Jun 2019 - 31 May 2020 | In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 + Others: Insurance Brokers | Miss Karina Tam 2190 7023 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|------------------------------------|--|-------------------------------------|--|--|------------------------------|
| 80/74/26 | The Hong Kong Institute of Bankers | Strive for Communication Excellence * | 24 | 1 Sep 2019 - 31 Aug 2020 | In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 + Others: Insurance Brokers | Miss Karina Tam 2190 7023 |
| 80/74/27 | The Hong Kong Institute of Bankers | Influence Lending Practice and Cross-border Financing for Mainland Business 貸款操作與跨境融資 對內地業務的影響 * | 14 | 30 Jun 2019 - 29 Jun 2020 | In-house 內部員工 + Public 公眾人士 + Others: Insurance Brokers | Miss Karina Tam 2190 7023 |
| 80/74/28 | The Hong Kong Institute of Bankers | Wealth Management for High Net-Worth Individuals (HNWIs) * | 24 | 28 Jun 2019 - 27 Jun 2020 | In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 + Others: Insurance Brokers | Miss Karina Tam 2190 7023 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|----------------------------|------------------------------------|--|-------------------------------------|--|--|-----------------------------------|
| 80/74/29 Renewed | The Hong Kong Institute of Bankers | Certified Private Wealth Professionals (CPWP) Module 2 - Ethics and Compliance * | 12 | 1 Oct 2019 - 30 Sep 2020 | 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 |
| 80/74/30 | The Hong Kong Institute of Bankers | ECF - Retail Wealth Management (RWM) * | 105 | 12 Mar 2019 - 11 Mar 2020 | In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 | Miss Karina Tam 2190 7023 |
| 80/74/31 | The Hong Kong Institute of Bankers | Regulations, Data Privacy and Tools for Wealth Management * | 8 | 8 May 2019 - 7 May 2020 | In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 + Others: Insurance Brokers | Miss Karina Tam 2190 7023 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|--|-------------------------------------|--|---|------------------------------|
| 80/78/09 | Hong Kong Financial Services Professional Association Limited | Investment and Financial Planning * | 24 | 1 Sep 2019 - 31 Aug 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Ricky Lee 2151 2618 |
| 80/78/10 | Hong Kong Financial Services Professional Association Limited | 財務策劃銷售概念及技巧課程 * | 24 | 1 Sep 2019 - 31 Aug 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Ricky Lee 2151 2618 |
| 80/78/11 | Hong Kong Financial Services Professional Association Limited | Life Stages Wealth Management & Selling Skills 人生階段財富管理與銷售技巧 * | 24 | 1 Feb 2019 - 31 Jan 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Ricky Lee 2151 2618 |
| 80/78/12 | Hong Kong Financial Services Professional Association Limited | Wealth Management for High-Net Worth (HNW) Clients 高端客戶之財富管理 * | 10 | 1 Apr 2019 - 31 Mar 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Ricky Lee 2151 2618 |
| 80/85/04 | AXA China Region Insurance Company Limited | Principles of Professional Selling * | 12 | 1 Apr 2019 - 31 Mar 2020 | In-house 內部員工 | Mr Frankie Lam 3586 3207 |
| 80/92/02 | Institute of Financial Planners of Hong Kong | Practices & Updates in Financial Planning I * | 46 | 1 Jul 2019 - 30 Jun 2020 | Public 公眾人士 | Ms Kasia Cheung 2982 7861 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|---|-------------------------------------|--|---|------------------------------|
| 80/92/03 | Institute of Financial Planners of Hong Kong | Practices & Updates in Financial Planning II * | 57 | 1 Apr 2019 - 31 Mar 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Kasia Cheung 2982 7861 |
| 80/92/04 | Institute of Financial Planners of Hong Kong | Practices & Updates in Financial Planning III - Investment and Risk Management Series * | 71 | 1 Feb 2019 - 31 Jan 2020 | Public 公眾人士 | Ms Kasia Cheung 2982 7861 |
| 80/92/05 | Institute of Financial Planners of Hong Kong | Practices & Updates in Financial Planning IV * | 53 | 1 Feb 2019 - 31 Jan 2020 | Public 公眾人士 | Ms Kasia Cheung 2982 7861 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-----------------------------|---|---|-------------------------------------|--|---|--------------------------------------|
| 80/92/06 | Institute of Financial Planners of Hong Kong | Practices and Updates in Financial Planning V * | 63 | 1 May 2019 - 30 Apr 2020 | 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 * | 69 | 1 Sep 2019 - 31 Aug 2020 | 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 * | 59 | 1 Nov 2018 - 31 Oct 2019 | In-house 內部員工 + Public 公眾人士 | Ms Kasia Cheung 2982 7861 |
| 80/92/10 Renewed | Institute of Financial Planners of Hong Kong | Practices and Updates in Financial Planning IX * | 10 | 1 Oct 2019 - 30 Sep 2020 | Public 公眾人士 | Ms Kasia Cheung 2982 7861 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|--------------------------------|--|---|-------------------------------------|--|--------------------------------|---|
| 80/98/04 | Marsh (Hong Kong) Limited | Compliance & Professional Standards | 2.5 | 31 Oct 2018 - 30 Oct 2019 | In-house 內部員工 | Miss Laurine Chan 2301 7222 |
| 80/98/06 | Marsh (Hong Kong) Limited | Crisis Risk Management * | 6 | 22 Oct 2018 - 21 Oct 2019 | In-house 內部員工 | Mr Arthur Lam 2301 7282 |
| 80/98/07 New | Marsh (Hong Kong) Limited | Managing @ Marsh | 13.5 | 16 Sep 2019 - 15 Sep 2020 | In-house 內部員工 | Ms Sara Lui 2864 5308 |
| 80/101/20 | Everbright Sun Hung Kai Company Limited | Insurance Training * | 10 | 19 Jun 2019 - 18 Jun 2020 | In-house 內部員工 | Mr Sun Cheuk Fung Roy 3920 1852 |
| 80/101/21 | Everbright Sun Hung Kai Company Limited | Essential Skills for Financial Practitioners (X) * | 10 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 | Ms Angela Wu 3920 2962 |
| 80/101/22 | Everbright Sun Hung Kai Company Limited | Insurtech and Bayarea 保險科技與大灣區 * | 8 | 16 Sep 2019 - 15 Sep 2020 | In-house 內部員工 | Mr Yeung Wai Ho David 3920 2742 |
| 80/101/23 New | Everbright Sun Hung Kai Company Limited | Anti-Money Laundering and Counter-Terrorist Financing Training | 1.5 | 19 Sep 2019 - 18 Sep 2020 | In-house 內部員工 | Mr Kevin Yau 3920 2432 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|--|-------------------------------------|--|---|---------------------------------------|
| 80/105/02 | Professional School of Enneagram Limited | Understanding Your Customers Through Enneagram * | 8 (Long Version) | 2 Aug 2019 - 1 Aug 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Miss Kwok Lai Fun Kattie 9196 4776 |
| | | | 5 (Shorter Version 1) | | | |
| 80/105/03 | Professional School of Enneagram Limited | Objection Handling Made Easy Through Enneagram * | 8 (Long Version) | 2 Aug 2019 - 1 Aug 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Miss Kwok Lai Fun Kattie 9196 4776 |
| | | | 3 (Shorter Version 1) | | | |
| 80/109/05 | MetLife Limited | Examination Preparation Class for Insurance Intermediaries Qualifying Examination – Paper V 保險中介人資格考試備試班 試卷五： 投資相連長期保險 | 5 | 19 Dec 2018 - 18 Dec 2019 | In-house 內部員工 | Miss Ho Ka Wing Kay 2199 1135 |
| 80/109/06 | MetLife Limited | Leadership Training Series 領袖之路系列 * | 13 | 1 Mar 2019 - 29 Feb 2020 | In-house 內部員工 | Miss Ho Ka Wing 2199 1135 |
| 80/109/07 | MetLife Limited | MetLife Four - Personal Branding for Insurance Specialist | 6 | 27 Feb 2019 - 26 Feb 2020 | In-house 內部員工 | Miss Ho Ka Wing 2199 1135 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|--------------------------------|--|---|-------------------------------------|--|---|--------------------------------------|
| 80/109/08 | MetLife Limited | High Net-Worth Client Selling Training Series 高資產客戶銷售系列 * | 5 | 26 Jun 2019 - 25 Jun 2020 | In-house 內部員工 | Miss Ho Ka Wing 2199 1135 |
| 80/109/09 | MetLife Limited | Mandatory Provident Fund (MPF) Training Series 強制性公積金(強積金) 培訓系列 * | 7 | 22 Aug 2019 - 21 Aug 2020 | In-house 內部員工 | Miss Ho Ka Wing 2199 1135 |
| 80/113/05 | China CITIC Bank International Limited | Wealth Planning Series * | 22 | 10 Apr 2019 - 9 Apr 2020 | In-house 內部員工 | Ms Annie Wong 3603 2533 |
| 80/113/06 New | China CITIC Bank International Limited | Anti-Money Laundering Refresher Training | 2 | 10 Oct 2019 - 9 Oct 2020 | In-house 內部員工 | Mr Winfield Ho 3603 2522 |
| 80/122/11 | AIA International Limited (Incorporated in Bermuda with limited liability) | Sales Training Series * | 33.5 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Business Partners | Miss Ho Man Chi, Manchi 2100 1406 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|-----------------------------------|-------------------------------------|--|---|--------------------------------------|
| 80/122/13 | AIA International Limited (Incorporated in Bermuda with limited liability) | Selling and Soft Skill Training * | 29 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Business Partners | Miss Ho Man Chi, Manchi 2100 1406 |
| 80/122/14 | AIA International Limited (Incorporated in Bermuda with limited liability) | Hard Skill Training * | 37.5 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Business Partners | Miss Ho Man Chi, Manchi 2100 1406 |
| 80/122/15 | AIA International Limited (Incorporated in Bermuda with limited liability) | Sales Program * | 7 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 + Commissioning Body 委託機構員工 + Other: Business Partners | Miss Ho Man Chi, Manchi 2100 1406 |
| 80/122/16 | AIA International Limited (Incorporated in Bermuda with limited liability) | Corporate Solutions Series* | 29.5 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 + Commissioning Body 委託機構員工 + Other: Business Partners | Miss Ho Man Chi, Manchi 2100 1406 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|---|-------------------------------------|--|---|-------------------------------|
| 80/122/17 | AIA International Limited (Incorporated in Bermuda with limited liability) | Efficient Communication for Trustee Governance Issue Workshop | 2.5 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 | Mr Raymond Lam 3406 7520 |
| 80/123/02 | Franklin Templeton Investments (Asia) Ltd | Financial Planning Training Series (理財策劃培訓工作坊) * | 20 | 3 Jul 2019 - 2 Jul 2020 | In-house 內部員工 + Others: Business Partners frontline bank staff, advisors from insurance companies and IFA | Ms Daphne Yang 2829 0636 |
| 80/126/09 | The Bank of East Asia Ltd | Conduct of MPF Intermediaries and Development of the MPF System 強積金中介人操守及 強積金制度發展 | 2 | 16 Oct 2018 - 15 Oct 2019 | In-house 內部員工 | Ms Wong Ching Wa 3608 4874 |
| 80/126/10 | The Bank of East Asia Ltd | 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 | 2 | 23 May 2019 - 22 May 2020 | In-house 內部員工 | Ms Wong Ching Wa 3608 4874 |
| 80/131/04 | BMI Professional Training Centre Limited | CPD Training - Financial Management Series * | 14 | 3 Jun 2019 - 2 Jun 2020 | In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Helen Zhong 3970 9236 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|---|-------------------------------------|--|---|------------------------------|
| 80/135/08 | Principal Investment & Retirement Services Limited | Companion with Your Clients for Better Retirement Life | 2 | 14 Mar 2019 - 13 Mar 2020 | In-house 內部員工 + Others: Brokers and IFA | Miss Tracy Ng 2263 0691 |
| 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 | 2 | 6 May 2019 - 5 May 2020 | In-house 內部員工 + Others: MPF licensed intermediaries | Miss Tracy Ng 2263 0691 |
| 80/138/05 | China Life Insurance (Overseas) Company Limited | Need-Based Selling Workshop 需求為本銷售工作坊 * | 10 | 24 Jun 2019 - 23 Jun 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Members of associated companies and their franchises | Mr Wong Yiu Fai 2835 0293 |
| 80/138/10 | China Life Insurance (Overseas) Company Limited | 代理員市場行為規範 | 3 | 9 Jan 2019 - 8 Jan 2020 | In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 + Others: members of associated companies and their franchises | Mr Wong Yiu Fai 2835 0293 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|--|-------------------------------------|--|--|------------------------------|
| 80/138/16 | China Life Insurance (Overseas) Company Limited | Closer Look on Compliance in Selling MPF 強積金合規銷售睇真D | 2 | 1 Sep 2019 - 31 Aug 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Members of associated companies and their franchises | Ms Marina Tsang 2812 4530 |
| 80/138/17 | China Life Insurance (Overseas) Company Limited | 提升代理人專業形象 * | 7 | 26 Dec 2018 - 25 Dec 2019 | In-house 內部員工 + Commissioning Body 委託機構員工 | Mr Wong Yiu Fai 2835 0293 |
| 80/138/19 | China Life Insurance (Overseas) Company Limited | 合規銷售與最佳範例 | 3 | 1 Jul 2019 - 30 Jun 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Members of associated companies and their franchises | Mr Wong Yiu Fai 2835 0293 |
| 80/138/23 | China Life Insurance (Overseas) Company Limited | 從營銷到客戶關係 * | 10 | 24 Jun 2019 - 23 Jun 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Members of associated companies and their franchises | Mr Wong Yiu Fai 2835 0293 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|---|-------------------------------------|--|--|---------------------------------------|
| 80/138/24 | China Life Insurance (Overseas) Company Limited | 強積金業務課程 * | 5.5 | 11 Jul 2019 - 10 Jul 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Brokers | Miss Kwok Ka Yu, Kristen 2831 5665 |
| 80/138/25 | China Life Insurance (Overseas) Company Limited | 投保手續360 * | 7 | 29 Aug 2019 - 28 Aug 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Members of associated companies and their franchises | Mr Wong Yiu Fai 2835 0293 |
| 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 * | 24 | 8 Oct 2018 - 7 Oct 2019 | Public 公眾人士 + Others: 商會會員 | Mr Joe Yip 9015 3204 |
| 80/143/06 | BCT Financial 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 | 2 | 12 Jun 2019 - 11 Jun 2020 | In-house 內部員工 + Others: Subsidiary Intermediaries of channel partners | Mr Kelvin Chiu 2298 9178 |
| 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 | 14 | 10 Jan 2019 - 9 Jan 2020 | Public 公眾人士 | Mr Allan Wan 3152 2314 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|----------------------------------|--|-------------------------------------|--|---|-------------------------------------|
| 80/146/03 | WBP Business Mandarin HK Ltd | 如何與內地高端客戶打交道 * | 10 | 1 Nov 2018 - 31 Oct 2019 | Public 公眾人士 + Commissioning Body 委託機構員工 | Dr Wendy Chou 6516 6288 |
| 80/151/03 | Zurich Insurance Company Limited | Travel Insurance & Risk Management Workshop 旅遊保險與風險管理研習坊 | 3 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 + Commissioning Body 委託機構員工 | Mr Terry So 2977 0632 |
| 80/151/04 | Zurich Insurance Company Limited | The Essentials to attract high-end customer & handle challenging situation | 4 | 1 May 2019 - 30 Apr 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 | Mr Terry So 2977 0632 |
| 80/151/05 | Zurich Insurance Company Limited | Enhancing your Technical Knowledge in Travel Insurance | 3 | 1 Apr 2019 - 31 Mar 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 | Mr Terry So 2977 0632 |
| 80/154/03 | 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) | 10 | 12 Jan 2019 - 11 Jan 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Chan Ming Ling, Eva 9080 1696 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|-----------------------------|---|-------------------------------------|--|--|-------------------------------------|
| 80/154/04 | APEC Education Limited | 強積金投資攻略 | 5 | 20 Aug 2019 - 19 Aug 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Chan Ming Ling, Eva 9080 1696 |
| 80/154/05 | APEC Education Limited | 銷售金融產品的合規要求 * | 6 | 12 Jan 2019 - 11 Jan 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Chan Ming Ling, Eva 9080 1696 |
| 80/154/06 | 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 | 5 | 15 Feb 2019 - 14 Feb 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Chan Ming Ling, Eva 9080 1696 |
| 80/155/04 | Universal Prestige Inc. Ltd | 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 | 10 | 4 Apr 2019 - 3 Apr 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Leo Lam 9105 7081 |
| 80/155/05 | Universal Prestige Inc. Ltd | Asset Management and knowledge within marriage and its laws 婚姻的法則與理財規劃 * | 8 | 4 Apr 2019 - 3 Apr 2020 | In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Leo Lam 9105 7081 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|-----------------------------|--|-------------------------------------|--|--|------------------------------|
| 80/155/08 | Universal Prestige Inc. Ltd | Investment, Stocks and Financial History Course 投資 x 股票 x 金融歷史課程 | 10 | 9 Oct 2018 - 8 Oct 2019 | Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Leo Lam 9105 7081 |
| 80/160/04 | Heepon Company Limited | Issues around Risk Management and Insurance Risks * | 19 | 14 Jun 2019 - 13 Jun 2020 | In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Raymond Wong 6103 8938 |
| 80/160/05 | Heepon Company Limited | Issues around Benefits and Insurances of the Person * | 18 | 22 May 2019 - 21 May 2020 | In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Raymond Wong 6103 8938 |
| 80/160/06 | Heepon Company Limited | Issues in General Insurance and Insurance Practice 一般保險及實踐之論題 * | 22 | 21 Apr 2019 - 20 Apr 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Raymond Wong 6103 8938 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|--------------------------------|--|--|-------------------------------------|--|--|--|
| 80/163/03 | Hong Kong Academy of Professional Studies | Insurance Compliance Series 保險合規系列 * | 4.5 | 14 Dec 2018 - 13 Dec 2019 | Commissioning Body 委託機構員工 | Miss Kwok Yim Fong 9721 0894 |
| 80/164/06 | CPD Centre | 保險業架構及銷售法規 * | 10 | 10 Oct 2018 - 9 Oct 2019 | Commissioning Body 委託機構員工 | Mr Luk Tai Choi 9677 1027 |
| 80/164/07 | CPD Centre | 成功投資者具備的心態 | 5 | 28 Nov 2018 - 27 Nov 2019 | Commissioning Body 委託機構員工 | Mr Luk Tai Choi 9677 1027 |
| 80/164/08 New | CPD Centre | 保險中介人操守守則 * | 10 | 18 Oct 2019 - 17 Oct 2020 | 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) * | 8 | 25 Jan 2019 - 24 Jan 2020 | In-house 內部員工 | Mr Lee Pak Wing Vincent 3767 9274 |
| 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 * | 6 | 23 Jan 2019 - 22 Jan 2020 | In-house 內部員工 | Mr Lee Pak Wing Vincent 3767 9274 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--------------------------------------|--|-------------------------------------|--|---|---|
| 80/166/04 | 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 * | 10 | 1 Feb 2019 - 31 Jan 2020 | In-house 內部員工 + Others: Business Partners (Brokerage staff, Bank staff) | Miss Cheng Ka Wan (Sandy) 3767 9275 |
| 80/167/06 | Bank of China (Hong Kong) Limited | 香港金融市場簡介與發展， 暨股票市場及投資分析 | 2 | 30 Apr 2018 - 29 Apr 2019 | In-house 內部員工 | Ms Leung Man Chi 3197 5336 |
| 80/167/07 | Bank of China (Hong Kong) Limited | BOC WAY FORWARD - 客盤管理與關係深化 | 7 | 25 Oct 2018 - 24 Oct 2019 | In-house 內部員工 | Ms Tsang Hon Yin 3197 5344 |
| 80/167/08 | Bank of China (Hong Kong) Limited | Legal & Regulatory Updates | 4 | 15 Nov 2018 - 14 Nov 2019 | In-house 內部員工 | Ms Tsang Hon Yin 3197 5344 |
| 80/167/09 | Bank of China (Hong Kong) Limited | 績效及職涯輔導技巧培訓 | 7 | 15 Nov 2018 - 14 Nov 2019 | In-house 內部員工 | Ms Tsang Hon Yin 3197 5344 |
| 80/167/10 | Bank of China (Hong Kong) Limited | 季度投資市場分析講座 * | 6 | 14 Jan 2019 - 13 Jan 2020 | In-house 內部員工 | Ms Tsang Hon Yin 3197 5344 |
| 80/167/11 | Bank of China (Hong Kong) Limited | 投資合規 | 6 | 27 May 2019 - 26 May 2020 | In-house 內部員工 | Ms Tsang Hon Yin 3197 5344 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|---|-------------------------------------|--|---|-------------------------------|
| 80/167/12 | Bank of China (Hong Kong) Limited | 分行合規 | 3 | 27 May 2019 - 26 May 2020 | In-house 內部員工 | Ms Tsang Hon Yin 3197 5344 |
| 80/167/13 | Bank of China (Hong Kong) Limited | 保險直銷團隊 - 創建敏捷團隊工作坊2019 | 7 | 2 Jul 2019 - 1 Jul 2020 | In-house 內部員工 | Ms Tsang Hon Yin 3197 5344 |
| 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 * | 8 | 5 Jul 2019 - 4 Jul 2020 | 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 * | 8 | 5 Jul 2019 - 4 Jul 2020 | Others: 本會會員、保險及理財 行業有關人士 (Member of the Association (HKIIA), Insurance and Financial Planning Practitioners | Mr Bill Ho 9800 8890 |
| 80/168/05 | Hong Kong Insurance Intermediaries Association Ltd | Personal Insurance Series 個人保險系列 * | 8 | 1 Jun 2019 - 31 May 2020 | 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 |
| 80/172/02 | GET Mdream Wealth Management Limited | Legal and Regulatory Requirements * | 7 | 29 Apr 2019 - 28 Apr 2020 | In-house 內部員工 | Ms Lam Sze Wan 2236 6924 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|---|-------------------------------------|--|---|------------------------------------|
| 80/172/03 | GET Mdream Wealth Management Limited | Financial Planning and Investment * | 8 | 15 Oct 2018 - 14 Oct 2019 | In-house 內部員工 | Miss Lee Hoi Koi, Ivy 2236 6925 |
| 80/173/08 | Prudential General Insurance Hong Kong Limited | Group Medical Insurance Training | 2 | 23 Jan 2019 - 22 Jan 2020 | In-house 內部員工 | Mr Marco Tsui 2977 8244 |
| 80/173/09 | Prudential General Insurance Hong Kong Limited | Home Insurance Training | 2 | 1 Mar 2019 - 29 Feb 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 | Ms Janice Churk 3722 5782 |
| 80/177/02 | VIP Consultancy Ltd | Marine Cargo Insurances 海上貨物運輸保險 * | 5 | 20 Oct 2018 - 19 Oct 2019 | Public 公眾人士 | Mr Wong Kong Fat 9732 6909 |
| 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 * | 10 | 1 Nov 2018 - 31 Oct 2019 | Public 公眾人士 | Mr Wong Kong Fat 9732 6909 |
| 80/178/02 | Assets & Estate Management (International) Association | 信託策劃實務工作坊 | 6 | 1 Aug 2019 - 31 Jul 2020 | Public 公眾人士 | Ms Shek Hei Man 3598 5020 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|------------------------------|---|---|-------------------------------------|--|---|---|
| 80/178/03 | Assets & Estate Management (International) Association | 遺產策劃實務工作坊 | 6 | 1 Aug 2019 - 31 Jul 2020 | Public 公眾人士 | Ms Shek Hei Man 3598 5020 |
| 80/179/03 Renewed | The Orchard Partnership Limited | World Class Communication Skills * | 16 | 1 Oct 2019 - 30 Sep 2020 | Others: Licenced Insurance Intermediaries in Hong Kong by CIB and PIBA | Mrs Lishan Tan 9832 4447 |
| 80/181/02 | Kirin Wealth Management Limited | Regulatory and Compliance Requirement * | 7 | 22 Dec 2018 - 21 Dec 2019 | In-house 內部員工 | Miss Natasha Mann 3701 0643 |
| 80/184/07 | Chong Hing Bank Limited | Coaching For Performance 指導技巧提升 | 7.5 | 20 Feb 2019 - 19 Feb 2020 | In-house 內部員工 | Ms Chan Kai Shan Anna 3768 0101 |
| 80/186/02 Renewed | Chinese Institute of Registered Financial Analysts Limited | 理財分析師系列- 物業市場法規實務工作坊 | 10 | 20 Sep 2019 - 19 Sep 2020 | Public 公眾人士 | Ms Shek Hei Man 3598 5020 |
| 80/188/02 | Professional Training Association | 現代理財規劃 | 6 | 25 May 2019 - 24 May 2020 | Public 公眾人士 | Ms Sammy Leung 6180 6813 / 2301 9876 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|---|-------------------------------------|--|---|---|
| 80/188/03 | Professional Training Association | 現代理財規劃之實用 財務計算機課程 | 4 | 25 May 2019 - 24 May 2020 | Public 公眾人士 | Ms Sammy Leung 6180 6813 / 2301 9876 |
| 80/189/03 | QBE Hongkong & Shanghai Insurance Limited | Insurance Claims Complaints Case Sharing 保險索償投訴個案分享 | 5 | 15 Oct 2018 - 14 Oct 2019 | 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 * | 6 | 1 Jan 2019 - 31 Dec 2019 | In-house 內部員工 + Others: Insurance Agents and Insurance Brokers | Mr Edward Chan 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 | 5.5 | 1 Apr 2019 - 31 Mar 2020 | 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 | 保險中介人預備課程： 一般保險 * | 6 | 1 Jul 2019 - 30 Jun 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: Business Partners, Brokers | Mr Wong Chung Lai 2236 6639 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|--|-------------------------------------|--|---|-------------------------------|
| 80/195/02 | Enrich Culture Group | Practical Training Program for Professional Financial Advisors 專業理財顧問實務培訓課程 * | 40 | 20 May 2019 - 19 May 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Miss Joey Chong 2170 7968 |
| 80/195/03 | Enrich Culture Group | Wealth Management Series 1 財富管理- 富足規劃系列一 * | 8 | 26 Feb 2019 - 25 Feb 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Ling So 2170 7972 |
| 80/198/02 | Euler Hermes Hong Kong Services Limited | Trade Credit Insurance - Comprehensive Introduction and Efficient Prospecting Workshop | 2 | 14 May 2019 - 13 May 2020 | 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 * | 3 | 25 Apr 2019 - 24 Apr 2020 | 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 | 2 | 25 Apr 2019 - 24 Apr 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Wong Ming Kit 6015 3603 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------------------|--|--|-------------------------------------|--|---|--|
| 80/200/02 | Yingwork Company Limited | Chinese Family Wealth Management Legal Certificate Course 中國家庭財富規劃與 傳承法律證書課程 | 8 | 4 Feb 2019 - 3 Feb 2020 | Public 公眾人士 | Miss Hui Ka Man Camille 3618 7811 |
| 80/202/03 | China Taiping Life Insurance (Hong Kong) Company Limited | Professional Client Service Series 專業客戶服務攻略系列 * | 6 | 1 Apr 2019 - 31 Mar 2020 | In-house 內部員工 + Others: Insurance Agents, Brokers, Agents From Partners' Bank | Miss Wong Ching Man, Mandy 2855 5635 |
| 80/202/04 | China Taiping Life Insurance (Hong Kong) Company Limited | Financial Planning Series 理財概念系列 * | 6 | 1 Apr 2019 - 31 Mar 2020 | In-house 內部員工 + Others: Insurance Agents, Brokers, Agents From Partners' Bank | Miss Wong Ching Man, Mandy 2855 5635 |
| 80/202/05 | China Taiping Life Insurance (Hong Kong) Company Limited | Anti-Money Laundering & Terrorist Financing 打擊洗錢及恐怖分子 資金籌集等合規指引培訓 | 3 | 1 Apr 2019 - 31 Mar 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 + Others: insurance agents, brokers, agents from partners' bank | Miss Wong Ching Man, Mandy 2855 5635 |
| 80/202/06 New | China Taiping Life Insurance (Hong Kong) Company Limited | New Agents Training Course 新入職代理人培訓課程 * | 12 | 1 Oct 2019 - 30 Sep 2020 | In-house 內部員工 | Miss Wong Ching Man, Mandy 2855 5565 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|---|-------------------------------------|--|---|------------------------------|
| 80/203/02 | SunLeap International Leadership Training Academy Company Limited | 「行銷心理學」工作坊 * | 10 | 15 Oct 2018 - 14 Oct 2019 | Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Fu Ming Chi 6180 8796 |
| 80/205/04 | Jardine Lloyd Thompson PCS Limited | JLT PCS Leadership Huddle Module IV: Managing Change | 2.5 | 9 Nov 2018 - 8 Nov 2019 | In-house 內部員工 | Ms Emily Chau 2864 5385 |
| 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 * | 21 | 23 Apr 2019 - 22 Apr 2020 | 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 * | 8 | 20 Jul 2019 - 19 Jul 2020 | In-house 內部員工 + Public 公眾人士 | Miss Katrina Xu 2191 8558 |
| 80/212/02 | Mercer (Hong Kong) Limited | HK Retirement Scheme Landscape – MPF vs ORSO | 2 | 15 Oct 2018 - 14 Oct 2019 | Commissioning Body 委託機構員工 | Ms Fion Lam 3476 3709 |
| 80/212/03 | Mercer (Hong Kong) Limited | HK Voluntary Health Insurance Scheme: Key Facts, Updates & Considerations | 2 | 12 Jul 2019 - 11 Jul 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 | Ms Fion Lam 3476 3709 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-----------------------------|----------------------------------|---|-------------------------------------|--|---|-------------------------------|
| 80/214/02 Renewed | Willis Hong Kong Limited | Managing risk through analytics | 2 | 1 Oct 2019 - 30 Sep 2020 | In-house 內部員工 | Ms Jaime Mong 2195 5626 |
| 80/214/03 Renewed | Willis Hong Kong Limited | Retirement Planning and Implication to Retirement Landscape in Hong Kong | 2 | 1 Oct 2019 - 30 Sep 2020 | In-house 內部員工 | Ms Jaime Mong 2195 5626 |
| 80/214/04 | Willis Hong Kong Limited | Business Conduct | 2 | 02 Oct 2018 - 01 Oct 2019 | 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 | 2 | 1 May 2019 - 30 Apr 2020 | In-house 內部員工 | Ms Jaime Mong 2195 5626 |
| 80/216/02 | Gard (HK) Limited | Introduction to Marine Insurance | 11 | 9 Oct 2018 - 8 Oct 2019 | In-house 內部員工 + Others: Members/clients of CPD provider | Miss Sharon Chan 2901 8616 |
| 80/217/02 | Zeal Asset Management Limited | Investment Foundation Program 投資基礎課程 | 2 | 1 Mar 2019 - 28 Feb 2020 | In-house 內部員工 + Commissioning Body 委託機構員工 | 陳捷豪先生 3626 9735 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|----------------------------|-------------------------------------|--|---|------------------------------|
| 80/219/02 | Times College (Sham Shui Po) | 客戶滿意的保險銷售技巧 | 5 | 9 Mar 2019 - 8 Mar 2020 | Public 公眾人士 | Mr Vincent Lau 6807 7716 |
| 80/219/03 | Times College (Sham Shui Po) | 保險業人事招募管理 | 3 | 4 Apr 2019 - 3 Apr 2020 | Public 公眾人士 | Mr Vincent Lau 6807 7716 |
| 80/219/04 | Times College (Sham Shui Po) | 了解保險行業項目發展方向 | 2 | 4 Apr 2019 - 3 Apr 2020 | Public 公眾人士 | Mr Vincent Lau 6807 7716 |
| 80/220/02 | Bones Villa Limited | 理財計劃中不應被忽略的環節 - 殯儀安排與費用 | 3 | 1 Mar 2019 - 29 Feb 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Mr Kwan Tak Yan 9654 8135 |
| 80/222/02 | Wa Hong International Training And Education Group | 投資規劃培訓系列 * | 8 | 1 May 2019 - 30 Apr 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 + Others: agent, broker | Mr Lai Ping Wa 9348 1521 |
| 80/224/02 | Virtuous Global Investment Limited | MPF evolution 強積金的發展 * | 5 | 19 Jun 2019 - 18 Jun 2020 | Public 公眾人士 | Mr Fong Wai Lun 9253 6070 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|---|-------------------------------------|--|--|---|
| 80/226/02 | Greater China Corporate Trainers Association | 資產傳承實務 * | 12 | 27 Sep 2019 - 26 Sep 2020 | Others: 保險中介人 | Miss Sylvia Lee 5540 0353 |
| 80/227/02 | Vista Academy Co Limited | Insurance Management and Legal Studies Series * | 9 | 17 Jun 2019 - 16 Jun 2020 | 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 * | 10 | 1 Jul 2019 - 30 Jun 2020 | Public 公眾人士 + Commissioning Body 委託機構員工 | Ms Rachael Lai 5501 9366 |
| IA/00/17 | Hong Kong Securities and Investment Institute | HKSI Institute Roundtable Luncheon Series: Luncheon with Chairman of IA | 1 | 14-Oct-19 | Public | Rick Lai 3120 6146 / Lee Ling HEW 3120 6142 |
| IA/03/04 | Independent Commission Against Corruption (ICAC) | Seminar on Corruption Prevention and Managing Staff Integrity for Managers of Life Insurance Sector 專業道德及防貪研討會 ——人壽保險管理人員持續專業培訓 | 2 | Apr 2019 – Mar 2020 | Public (upon request by individual companies or professional bodies of insurance industry only) 公眾人士 (須由個別公司或保險業團體提出要求) | Ms Yvonne Chan 2826 3287 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|--|--|-------------------------------------|--|--|-----------------------------|
| IA/03/05 | Independent Commission Against Corruption | Seminar on Corruption Prevention and Professional Ethics for Life Insurance Intermediaries (with case studies) 專業道德及防貪研討會—人壽保險中 介人持續專業培訓 (包括個案討論) | 1.5 | Apr 2019 – Mar 2020 | Public (upon request by individual companies or professional bodies of insurance industry only) 公眾人士 (須由個別公司或保險業 團體提出要求) | Ms Yvonne Chan 2826 3287 |
| IA/03/06 | Independent Commission Against Corruption | Seminar on Corruption Prevention and Professional Ethics for Life Insurance Intermediaries 專業道德及防貪研討會— 人壽保險中介人持續專業培訓 | 1 | Apr 2019 – Mar 2020 | Public (upon request by individual companies or professional bodies of insurance industry only) 公眾人士 (須由個別公司或保險業 團體提出要求) | Ms Yvonne Chan 2826 3287 |
| IA/03/07 | Independent Commission Against Corruption | Seminar on Corruption Prevention and Managing Staff Integrity for Managers of General Insurance Sector 專業道德及防貪研討會 -- 一般保險管理人員持續專業培訓 | 1.5 | Nov 2018 – Oct 2019 | Public (upon request by individual companies or professional bodies of insurance industry only) 公眾人士 (須由個別公司或保險業 團體提出要求) | Ms Yvonne Chan 2826 3287 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|---|-------------------------------------|--|--|-----------------------------|
| IA/03/08 | Independent Commission Against Corruption | Seminar on Corruption Prevention and Professional Ethics for General Insurance Intermediaries 專業道德及防貪研討會 -- 一般保險中介人持續專業培訓 | 1 | Nov 2018 – Oct 2019 | Public (upon request by individual companies or professional bodies of insurance industry only) 公眾人士 (須由個別公司或保險業 團體提出要求) | Ms Yvonne Chan 2826 3287 |
| IA/08/02 | Office of the Privacy Commissioner for Personal Data, Hong Kong | Data Protection and Data Access Request | 3 | Apr 2019 – Mar 2020 | Insurance Practitioners 保險從業員 | Mr Collin Chiu 2877 7169 |
| IA/08/03 | Office of the Privacy Commissioner for Personal Data, Hong Kong | Data Protection in Human Resource Management | 3 | Apr 2019 – Mar 2020 | Insurance Practitioners 保險從業員 | Mr Collin Chiu 2877 7169 |
| IA/08/04 | Office of the Privacy Commissioner for Personal Data, Hong Kong | Data Protection in Direct Marketing Activities | 3 | Apr 2019 – Mar 2020 | Insurance Practitioners 保險從業員 | Mr Collin Chiu 2877 7169 |

| Ref 參考編號 | Name of Organizer 舉辦機構名稱 | Title of Activity 活動名稱 | 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 |
|-------------|---|------------------------------|-------------------------------------|--|----------------------------------|-----------------------------|
| IA/08/05 | Office of the Privacy Commissioner for Personal Data, Hong Kong | Data Protection in Insurance | 3 | Feb 2019 – Jan 2020 | Insurance Practitioners 保險從業員 | Mr Collin Chiu 2877 7169 |