



香港專業保險經紀協會
PROFESSIONAL INSURANCE BROKERS ASSOCIATION

Ref. No. : MEMO/001/2016
To : All Members and Chief Executives
From : Jase Yiu – Chief Administrative Executive
Date : 5 January 2016
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Dear all,

Re: PIBA Financial Needs Analysis (“FNA”) Form for both Class A and C Products pursuant to “Initiative on FNA” issued by the Hong Kong Federation of Insurers (“HKFI”)

Following our Memo of 22 December 2015, we would like to remind that PIBA FNA Form has taken effect on 1 January 2016. Members are encouraged to make good use of the Form for financial needs analysis (FNA) purpose.

When conducting the FNA, members should always ensure the insurance products recommended to a customer should meet his/her objective(s) and need(s). As far as Q.5 of the FNA form prescribed by the HKFI is concerned, the broker member should explore at least two similar products to the customer with documentation in question 5 of the FNA Form. Where there is only one insurance product that can meet the customer’s objective(s) and need(s), then the customer must be fully explained and provided with clear and sound justifications, which should be properly documented by the member in the FNA form.

The List of Insurers who accepted PIBA FNA Form has been uploaded on “Download Corner” of our website. When more insurers accept PIBA FNA Form, we will update the List accordingly.

Should you have any queries, please feel free to contact the undersigned.

Wishing you all a prosperous new year 2016!

Best Regards,



Jase Yiu
Chief Administrative Executive

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