

Continuing Professional Development for Licensed Insurance Intermediaries
持牌保險中介人持續專業培訓
List of currently available Type 1 Qualified CPD Activities (approved by HKCAAVQ) adopting virtual classroom arrangement
for public
獲香港學術及職業資歷評審局批准以網上虛擬課程方式進行的第1類合資格持續專業培訓活動
(現正向公眾人士開放)

Information on this list is extracted from the List of Currently Approved Type 1 Qualified CPD Activities for Licensed Insurance Intermediaries published by HKCAAVQ. Please visit HKCAAVQ's website for the full list:

<https://www.hkcaavq.edu.hk/en/services/assessment/cpd-ia-programmes>

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

New: Newly approved activities

Renewed: Approval-Renewed activities

Ref 參考編號	Name of CPD Activity Provider 舉辦機構名稱	Title of Activity 活動名稱	CPD activity under the category of "Ethics or Regulations" 活動內容為「道德或規例」	No. of CPD hours 持續專業 培訓時數	Current Approval Period 現行 審批期限	Target Participant 培訓對象	Contact 聯絡方法
80/02/98	FWD Life Insurance Company (Bermuda) Limited	IIQE Paper V Examination Preparatory Course – Investment-linked Long Term Insurance 保險中介人資格考試 卷五備試課程 – 投資相連長期保險 *	No	14	12 Apr 2021 - 11 Apr 2022	Public 公眾人士 + Business Partners	Mr YEUNG Wang Yuk 28423703
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” *	No	16	1 Feb 2021 - 31 Jan 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/07	Vocational Training Council Institute of Professional Education And Knowledge	Hong Kong Insurance Legal Cases (with optional module of Alternative Insurance Dispute Resolution and/or Liability Insurance) *	No	16	1 Mar 2021 - 28 Feb 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/10	Vocational Training Council Institute of Professional Education And Knowledge	“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” *	No	30	01 May 2021 - 30 Apr 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822

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80/07/12	Institute of Professional Education and Knowledge, VTC	Legal Knowledge for Life Insurance Selling	No	5 (Long Version) 3 (Shorter Version 1)	01 Jun 2021 - 31 May 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/13	Vocational Training Council Institute of Professional Education And Knowledge	"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" *	No	15	01 May 2021 - 30 Apr 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/14 Renewed	Vocational Training Council Institute of Professional Education And Knowledge	"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") *	No	15	01 Sep 2021 - 31 Aug 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Rainbow LEE 2919-1402
80/07/18	Institute of Professional Education and Knowledge, VTC	Financial Planning (Estate Planning Inheritance and Probate) 財務策劃 (遺產繼承與承辦) *	No	10	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Hedley Chow 2836 1864
80/07/20	Institute of Professional Education and Knowledge, VTC	"Statutory Insurance - Employees' Compensation" with Optional Modules of "Mediation & Alternative Dispute Resolution Practice" and/or "A Comparison of Insurance Law Between China and Hong Kong" 《強制性保險條例 – 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》 *	No	15	1 Oct 2020 - 30 Sep 2021	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Lau Cheung Wing Eddy 2836 1863
80/07/26	Vocational Training Council Institute of Professional Education And Knowledge	Law Relating to Asset Protection 資產保障相關法律 *	No	10 (Long Version) 4 (Shorter Version 1) 3 (Shorter Version 2)	1 Mar 2021 - 28 Feb 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/27 Renewed	Vocational Training Council Institute of Professional Education And Knowledge	Duties of Fiduciaries and Criminal Law 受信人責任與刑事法 *	No	10	01 Sep 2021 - 31 Aug 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Rainbow LEE 2919-1402

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80/07/37	Vocational Training Council Institute of Professional Education And Knowledge	Boost your work competence with NLP 「身心語言程式學」工作坊 *	No	16	01 Apr 2021 - 31 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/41	Vocational Training Council Institute of Professional Education And Knowledge	Health Insurance 健康保險 *	No	20	01 Jan 2021 - 31 Dec 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/42	Institute of Professional Education and Knowledge, VTC	"Communicating without Talking" for Financial Professionals 「不言而喻」的奧妙 - 保險從業員工坊 *	No	8 (Normal Version)	1 Dec 2020 - 30 Nov 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
				5 (Shorter Version 1)			
				3 (Shorter Version 2)			
80/07/49 Renewed	Institute of Professional Education and Knowledge, VTC	Business Networking Workshop for Insurance Practitioners 商務人際網絡的建立 - 保險從業員工坊 *	No	16 (Long Version)	01 Sep 2021 - 31 Aug 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Sammy CHUNG 3974- 3674
				3 (Shorter Version 1)			
80/07/50	Vocational Training Council Institute of Professional Education And Knowledge	Industry Analysis and Stock Investment Series for Insurance Practitioners 保險從業員的行業分析與股票投資系列 *	No	15	1 Mar 2021 - 28 Feb 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/52	Vocational Training Council Institute of Professional Education And Knowledge	Travel Insurance 旅遊保險 *	No	12	01 Apr 2021 - 31 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/55	Vocational Training Council Institute of Professional Education And Knowledge	Advanced Technical Analysis 股市技術分析進階課程 *	No	16	01 May 2021 - 30 Apr 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/56	Institute of Professional Education and Knowledge, VTC	Master Your Memory for Business Success (Insurance Professionals) Workshop 記憶致勝(保險專業人士) 學習坊 *	No	16 (Long Version)	01 May 2021 - 30 Apr 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
				3 (Shorter Version 1)			
80/07/57 Renewed	Vocational Training Council Institute of Professional Education And Knowledge	Current Development on Investment Products Module 1-5 投資產品發展近況單元一至五 *	No	16	01 Sep 2021 - 31 Aug 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Dan CHAN 2836 1898
80/07/58	Institute of Professional Education and Knowledge, VTC	Creative Thinking Techniques for Business and Personal Enhancement (Insurance Professionals) Workshop 創意增值(保險專業人士)研習坊 *	No	16	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822

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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) *	No	16	5 Jan 2021 - 4 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/60	Institute of Professional Education and Knowledge, VTC	Risk Assessment and Management for Financial Service Executives 風險評估及管理(財經業人士) *	No	16	5 Jan 2021 - 4 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/62	Vocational Training Council Institute of Professional Education And Knowledge	Selling Genius Workshop (Insurance & Investment Professionals) 銷售奇才研習坊(保險及投資專業人士) *	No	16	01 May 2021 - 30 Apr 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/65 Renewed	Vocational Training Council Institute of Professional Education And Knowledge	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 *	No	16	01 Sep 2021 - 31 Aug 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Sammy CHUNG 3974- 3674
80/07/66	Institute of Professional Education and Knowledge, VTC	Investment Strategies Series 投資策略系列 *	No	16	1 Dec 2020 - 30 Nov 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/67	Institute of Professional Education and Knowledge, VTC	Key Economic Indicators and Investment Planning 主要經濟指標與投資策劃 *	No	16	1 Feb 2021 - 31 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/68	Institute of Professional Education and Knowledge, VTC	Sales Compliance Reviews and Updates for Financial Products Intermediaries 銷售合規須知及最新修訂(金融產品中介人) *	No	13	1 Feb 2021 - 31 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/69	Vocational Training Council Institute of Professional Education And Knowledge	Investing in Commodities Series 商品投資系列 *	No	16	01 Jun 2021 - 31 May 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/70	Vocational Training Council Institute of Professional Education And Knowledge	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) *	No	16	01 Jun 2021 - 31 May 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/71 Renewed	Vocational Training Council Institute of Professional Education And Knowledge	Persuasion Skills for Financial Professionals 說服技巧(金融服務專才) *	No	16	01 Sep 2021 - 31 Aug 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Sammy CHUNG 3974- 3674
80/07/72	Institute of Professional Education and Knowledge, VTC	Asian Securities Markets 亞洲證券市場 *	No	14	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822

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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) *	No	16	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/75	Institute of Professional Education and Knowledge, VTC	Know Your Customers' Investment Psychology (客戶投資心理解說) *	No	11	5 Jan 2021 - 4 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/76	Institute of Professional Education and Knowledge, VTC	Sales Essentials for Financial Professionals 銷售要訣(財經專才系列) *	No	16	1 Jan 2021 - 31 Dec 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/78	Vocational Training Council Institute of Professional Education And Knowledge	Understanding Mainland Financial System 內地金融制度入門 *	No	18	01 Aug 2021 - 31 Jul 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/80 Renewed	Vocational Training Council Institute of Professional Education And Knowledge	Liability in Cyber Age and Associated Insurance 網絡世紀中的法律責任及相關保險 *	No	8	01 Sep 2021 - 31 Aug 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Rainbow LEE 2919-1402
80/07/83	Institute of Professional Education and Knowledge, VTC	Strengthening Your Influential Power Course 強化影響力課程 *	No	16	1 Dec 2020 - 30 Nov 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/84	Institute of Professional Education and Knowledge, VTC	MPF Training Programme 強積金培訓 *	No	8	5 Jan 2021 - 20 May 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
				10	21 May 2021 - 4 Jan 2022		
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 *	No	10	1 Feb 2021 - 31 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/87	Institute of Professional Education and Knowledge, VTC	Social Media Marketing and Cloud Competitive Advantages for Financial Professionals 社交媒體和雲端競爭優勢[金融專才] *	No	17	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/88	Institute of Professional Education and Knowledge, VTC	China Real Estate Investment Strategies 中國房地產投資策略 *	No	14	1 Oct 2020 - 14 Jul 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
				17	15 Jul 2021 - 30 Sep 2021		
80/07/89	Institute of Professional Education and Knowledge, VTC	Essential Skills for Change Management 變革管理技巧 *	No	12	1 Dec 2020 - 30 Nov 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822

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80/07/90	Institute of Professional Education and Knowledge, VTC	Life and Medical Insurance 壽險及醫療險 *	No	6 (Long Version)	1 Dec 2020 - 30 Nov 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
				5 (Shorter Version)			
80/07/91	Institute of Professional Education and Knowledge, VTC	Mind Management Series - Stress Management 心靈管理系列 - 壓力管理 *	No	16	1 Dec 2020 - 30 Nov 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/92	Institute of Professional Education and Knowledge, VTC	Understanding RMB Internationalization and Financial Instruments 人民幣國際化和金融工具 *	No	14	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/93	Institute of Professional Education and Knowledge, VTC	Legacy Planning and Legacyology 傳承規劃和傳承學*	No	18.5 (Normal Version)	1 Dec 2020 – 30 Nov 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
				17 (Shorter Version)			
80/07/94	Institute of Professional Education and Knowledge, VTC	Customer Experience Management 客戶體驗管理 *	No	17 (Long Version)	5 Jan 2021 - 4 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
				14 (Shorter Version 1)			
80/07/99 Renewed	Vocational Training Council Institute of Professional Education And Knowledge	Achieving Wealth Management Excellence Series 財富管理技巧深造系列 *	No	14	01 Sep 2021 - 31 Aug 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Dan CHAN 2836 1898
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 *	No	10 (Long Version)	5 Jan 2021 - 4 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
				7 (Shorter Version 1)			
80/07/102	Vocational Training Council Institute of Professional Education And Knowledge	Common Personal Insurance Claims Disputes	No	3	01 Apr 2021 - 31 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/103	Vocational Training Council Institute of Professional Education And Knowledge	Family Laws for Financial Planners 家庭法 (理財策劃師須知)	No	5 (Long Version)	1 Mar 2021 - 28 Feb 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
				3 (Shorter Version 1)			
80/07/107	Institute of Professional Education and Knowledge, VTC	Regulatory Requirements for Selling Financial Products Updates 銷售金融產品的監管要求新知 *	No	27	1 May 2020 - 30 Apr 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822

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80/07/108	Vocational Training Council Institute of Professional Education And Knowledge	Introduction to Mainland Commercial Law for Financial Professionals 內地商務法例入門 (金融專業) *	No	18	01 May 2021 - 30 Apr 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/110	Institute of Professional Education and Knowledge, VTC	Employee Benefits Series 僱員福利系列 *	No	15	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Hedley Chow 2836 1864
80/07/112	Institute of Professional Education and Knowledge, VTC	HK & China Investment Outlook Seminar 中港投資展望 *	No	8	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/113	Institute of Professional Education and Knowledge, VTC	Significant Changes to Insurance Industry Regulation 保險業監管制度的重大修訂 *	No	8 (Long Version)	1 Feb 2021 - 31 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
				5 (Shorter Version 1)			
80/07/114	Institute of Professional Education and Knowledge, VTC	Bankruptcy Laws Relating to Credit Risk and Insurance *	No	10 (Long Version)	1 May 2021 - 30 Apr 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
				6 (Shorter Version 1)			
80/07/116	Vocational Training Council Institute of Professional Education And Knowledge	Mainland Contemporary Financial Topics 內地當前財經熱話 *	No	32	1 Mar 2021 - 28 Feb 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/121	Institute of Professional Education and Knowledge, VTC	Securities Analysis Approaches That Have Stood The Test Of Time 已經站穩時間考驗的證券分析方法 *	No	18 (1 Feb 2021 - 17 Aug 2021) 21 (18 Aug 2021 - 31 Jan 2022)	1 Feb 2021 - 31 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/122	Institute of Professional Education and Knowledge, VTC	Global Taxation Overview 環球稅制概覽 *	No	8 (Long Version)	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
				6 (Shorter Version 1)			
80/07/130	Vocational Training Council Institute of Professional Education And Knowledge	Essential Technical Insurance knowledge for effective service quality enhancement 優越服務必須掌握的保險知識 *	No	24	01 Apr 2021 - 31 Mar 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/131	Vocational Training Council Institute of Professional Education And Knowledge	Product Liability Insurance for Manufacturers and Exporters 產品責任保險 (承保製造商及出口商) *	No	5 (Long Version)	01 Apr 2021 - 31 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
				3 (Shorter Version 1)			

Ref 參考編號	Name of CPD Activity Provider 舉辦機構名稱	Title of Activity 活動名稱	CPD activity under the category of "Ethics or Regulations" 活動內容為「道德或規例」	No. of CPD hours 持續專業 培訓時數	Current Approval Period 現行 審批期限	Target Participant 培訓對象	Contact 聯絡方法
80/07/132	Vocational Training Council Institute of Professional Education And Knowledge	FinTech & The Finance Industry 金融科技與金融業 *	No	14	18 Apr 2021 - 17 Apr 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/134	Institute of Professional Education and Knowledge, VTC	Enhancing Interpersonal Relationships – Enneagram 提升人際關係 – 九型人格 *	No	7 (Long Version)	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Flora Chan 2836 1855
				6 (Shorter Version 1)			
80/07/135	Vocational Training Council Institute of Professional Education And Knowledge	Health Management Series 健康管理與養生系列 *	No	15	1 Dec 2020 - 30 Nov 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/140	Institute of Professional Education and Knowledge, VTC	Retirement Planning & Current Issues in the Insurance Industry 退休計劃與保險業當前熱話 *	No	6 (Normal Version)	1 Dec 2020 - 30 Nov 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
				3 (Shorter Version 1)			
				5 (Shorter Version 2)			
80/07/141	Institute of Professional Education and Knowledge, VTC	Behavioral Economics for the Finance Industry 行為經濟學(金融業) *	No	6	1 Feb 2021 - 31 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/143	Institute of Professional Education and Knowledge, VTC	Electronic Financial Service and Big Data 電子金融服務與大數據 *	No	16	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/144	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 *	No	23	1 Jan 2021 - 31 Dec 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/145	Institute of Professional Education and Knowledge, VTC	Basic Medical Knowledge & Related Insurance 基本醫學知識與相關保險 *	No	8	15 Jan 2021 - 14 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/147	Vocational Training Council Institute of Professional Education And Knowledge	How to Live a Healthy Life 如何活得健康 *	No	8	01 May 2021 - 30 Apr 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/148	Vocational Training Council Institute of Professional Education And Knowledge	打開向高資產客戶銷售保險的大門 *	No	6 (1 May 2021 - 1 Sep 2021) 9 (2 Sep 2021 - 30 Apr 2022)	01 May 2021 - 30 Apr 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822

Ref 參考編號	Name of CPD Activity Provider 舉辦機構名稱	Title of Activity 活動名稱	CPD activity under the category of "Ethics or Regulations" 活動內容為「道德或規例」	No. of CPD hours 持續專業 培訓時數	Current Approval Period 現行 審批期限	Target Participant 培訓對象	Contact 聯絡方法
80/07/149	Vocational Training Council Institute of Professional Education And Knowledge	Socially Responsible Investing (SRI) Series 社會責任投資 (SRI) 系列 *	No	9	01 Jul 2021 - 30 Jun 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/150	Vocational Training Council Institute of Professional Education And Knowledge	5G and the Finance Industry 5G與金融業 *	No	10	01 Aug 2021 - 31 Jul 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/151 Renewed	Vocational Training Council Institute of Professional Education And Knowledge	Advanced Technical Analysis – Ichimoku 進階圖表走勢理論 - 一目均衡圖 *	No	8	01 Sep 2021 - 31 Aug 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Dan CHAN 2836 1898
80/07/152 Renewed	Vocational Training Council Institute of Professional Education And Knowledge	Advanced Technical Analysis – Gann Theory 進階圖表走勢理論 - 江恩理論 *	No	8	01 Sep 2021 - 31 Aug 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Dan CHAN 2836 1898
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 *	No	8	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/154	Institute of Professional Education and Knowledge, VTC	Advanced Technical Analysis – Japanese Candlesticks 進階圖表走勢理論 - 陰陽燭 *	No	8	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/155	Institute of Professional Education and Knowledge, VTC	Advanced Technical Analysis – Dow Theory 進階圖表走勢理論 - 道氏理論 *	No	8	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/156	Institute of Professional Education and Knowledge, VTC	Advanced Technical Analysis – Elliott Wave Theory 進階圖表走勢理論 – 波浪理論 *	No	8	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/157	Institute of Professional Education and Knowledge, VTC	Advanced Technical Analysis – Point & Figure Chart 進階圖表走勢理論 – 點數圖 *	No	8	1 Oct 2020 - 30 Sep 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/158	Institute of Professional Education and Knowledge, VTC	Advanced Technical Analysis – Patterns Analysis 進階圖表走勢理論 – 形態分析 *	No	8	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822

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80/07/159	Institute of Professional Education and Knowledge, VTC	Derivative Financial Instruments 金融衍生工具 *	No	16	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/161	Institute of Professional Education and Knowledge, VTC	The Cyber Economy New Normal 網路經濟新常態 *	No	19	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/162	Institute of Professional Education and Knowledge, VTC	Compliance Training Courses for Insurance Agents 合規培訓課程(保險代理人) *	Yes	6	17 Dec 2020 - 16 Dec 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/163	Vocational Training Council Institute of Professional Education And Knowledge	Basic Medical Knowledge & Related Insurance II 基本醫學知識與相關保險 II *	No	11	09 Jan 2021 - 08 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/165	Vocational Training Council Institute of Professional Education And Knowledge	The New Solution of Sales Management (Insurance and Investment Professionals) 銷售管理新方向系列 (保險及投資專業人士) *	No	9	13 Mar 2021 - 12 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/167	Vocational Training Council Institute of Professional Education And Knowledge	Anti-Money Laundering and Counter-Terrorist Financing Ordinance and Relevant Regulatory Requirements 打擊洗錢及恐怖分子資金籌集條例和相關監管要求 *	Yes	9 (6 Oct 2020 - 31 Aug 2021) 12 (1 Sep 2021 - 5 Oct 2021)	6 Oct 2020 - 5 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/169	Institute of Professional Education and Knowledge, VTC	Business Ethics 商業道德操守 *	Yes	10	29 Jan 2021 - 28 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/170	Institute of Professional Education and Knowledge, VTC	Best Practices for Financial Products Intermediaries 金融產品中介人實務須知 *	No	10	18 Jan 2021 - 17 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/172	Vocational Training Council Institute of Professional Education And Knowledge	Regulatory Requirements for Selling Financial Products Updates 銷售金融產品的監管要求新知 *	Yes	14	1 Mar 2021 - 28 Feb 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/174 New	Vocational Training Council Institute of Professional Education And Knowledge	Anti-epidemic Fund Series: Professional Training Programme for Frontline MPF Practitioners 抗疫基金系列：強積金前線從業員專業培訓課程 *	No	4	30 Aug 2021 - 29 Aug 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Dan CHAN 2836 1898

Ref 參考編號	Name of CPD Activity Provider 舉辦機構名稱	Title of Activity 活動名稱	CPD activity under the category of "Ethics or Regulations" 活動內容為「道德或規例」	No. of CPD hours 持續專業 培訓時數	Current Approval Period 現行 審批期限	Target Participant 培訓對象	Contact 聯絡方法
80/20/39	Convoy Global Holdings Limited	Intensive Course: Licensing Examination for Securities and Futures Intermediaries - Fundamentals of Securities and Futures Regulation 精讀班: 證券及期貨從業員資格考試 (試卷一: 基本證券及期貨規則)	No	4	26 Apr 2021 - 25 Apr 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Miss CHEUNG Yuk Yu, Metis 36012338
80/20/40	Convoy Global Holdings Limited	Mandatory Provident Fund (MPF) Schemes Examination Intensive Course 強制性公積金計劃考試精讀班	No	3	16 Apr 2021 - 17 Apr 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Miss CHEUNG Yuk Yu, Metis 36012338
80/20/41	Convoy Global Holdings Limited	Intensive Course: Licensing Examination for Securities and Futures Intermediaries - Financial Market 精讀班: 證券及期貨從業員資格考試 (試卷七: 金融市場)	No	4	26 May 2021 - 25 May 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Miss CHEUNG Yuk Yu, Metis 36012338
80/20/42	Convoy Global Holdings Limited	Intensive Course: Licensing Examination for Securities and Futures Intermediaries - Securities 精讀班: 證券及期貨從業員資格考試 (試卷八: 證券)	No	4	22 Jun 2021 - 21 Jun 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Miss CHEUNG Yuk Yu, Metis 36012338
80/20/47	Convoy Global Holdings Limited	Behavioral Finance 行為金融學	No	3	31 May 2021 - 30 May 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr YEUNG Long Keen, Chris 36012234
80/20/48	Convoy Global Holdings Limited	Technical Analysis 技術分析	No	3	31 May 2021 - 30 May 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr YEUNG Long Keen, Chris 36012234

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80/20/49	Convoy Global Holdings Limited	Medical Claim 醫療索償	No	2	31 May 2021 - 30 May 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr YEUNG Long Keen, Chris 36012234
80/24/63	Institute of Advanced Executive Education, The Hong Kong Polytechnic University	Wealth Management for High-Net-Worth Market (1) 高淨值客戶行政財富管理(一) *	No	12	23 Jan 2021 - 22 Jan 2022	In-house 內部員工 + Public 公眾人士	Mrs Karen KIRBY WONG 34002763
80/24/65	Institute of Advanced Executive Education, The Hong Kong Polytechnic University	Market Updates for Financial Practitioners (2021-F-PJ1) *	No	10	05 Apr 2021 - 04 Apr 2022	In-house 內部員工 + Public 公眾人士	Mrs Karen KIRBY WONG 34002763
80/24/66	Institute of Advanced Executive Education, The Hong Kong Polytechnic University	Market Updates for Financial Practitioners (2021-F-PJ2) *	No	13	22 Apr 2021 - 21 Apr 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mrs Karen KIRBY WONG 34002763
80/24/67	Institute of Advanced Executive Education, The Hong Kong Polytechnic University	Market Updates for Financial Practitioners (2021-F-PJ3) *	No	11	19 May 2021 - 18 May 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mrs Karen KIRBY WONG 34002763
80/37/02	Standard Academy of Insurance & Management Ltd	Employee Compensation Ordinance *	No	5	01 Sep 2021 - 31 Aug 2022	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 *	No	5	01 Sep 2021 - 31 Aug 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
80/37/04	Standard Academy of Insurance & Management Ltd	28 Insurance Traps an insurance intermediary has to know *	No	5	01 Aug 2021 - 31 Jul 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350

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80/37/05	Standard Academy of Insurance & Management Ltd	Management Skills Enhancement Series No. 1 - Sales Management - Motivation and Communication *	No	10	01 Aug 2021 - 31 Jul 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
80/37/06	Standard Academy of Insurance & Management Ltd	Sale Made Simple - Popular Insurance Series No. 1 *	No	10	1 Nov 2020 - 30 Sep 2021	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 *	No	20	1 Dec 2020 - 30 Nov 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
80/37/08	Standard Academy of Insurance & Management Ltd	Management Series No. 2 *	No	20	01 Aug 2021 - 31 Jul 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
80/37/09	Standard Academy of Insurance & Management Ltd	Career and Job Management Series *	No	15	01 Feb 2021 - 31 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
80/37/10	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 *	No	7	01 May 2021 - 30 Apr 2022	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 *	No	5	01 May 2021 - 30 Apr 2022	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 *	No	5	01 May 2021 - 30 Apr 2022	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 *	No	5	1 Apr 2021 - 31 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
80/37/16 Renewed	Standard Academy of Insurance & Management Ltd	80 Insurance Clauses and Warranties an Insurance Intermediary has to understand *	No	5	01 Oct 2021 - 30 Sep 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350

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80/37/17 Renewed	Standard Academy of Insurance & Management Ltd	Staff, career and grief counselling for employees' assistance, motivation and enhancement of customers' services *	No	8	01 Oct 2021 - 30 Sep 2022	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 *	No	5	1 Mar 2021 - 28 Feb 2022	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 *	No	5	01 Sep 2021 - 31 Aug 2022	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 *	No	5	01 Sep 2021 - 31 Aug 2022	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 *	No	5	01 Aug 2021 - 31 Jul 2022	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 *	No	5	01 Feb 2021 - 31 Jan 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
80/37/25	Standard Academy of Insurance & Management Ltd	Professional Level CPD Course - Most Updated Court Interpretation of Insurance Policy Contract Terms and Conditions (Part I) *	No	5	01 Aug 2021 - 31 Jul 2022	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 *	No	5	01 Sep 2021 - 31 Aug 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
80/37/27	Standard Academy of Insurance & Management Ltd	Effective Leadership *	No	5	1 Apr 2021 - 31 Mar 2022	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 *	No	15	1 Mar 2020 - 28 Feb 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350

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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 *	No	5	1 Apr 2021 - 31 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
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 *	No	10	1 Mar 2021 - 28 Feb 2022	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 *	No	10	1 Apr 2021 - 31 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
80/37/32	Standard Academy of Insurance & Management Ltd	Professional Ethics and Regulation Series I - New Codes, General Principles and Ordinance for Insurance Intermediaries *	Yes	8	01 Jul 2021 - 30 Jun 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Dr Raymond Chow 2523 6350
80/38/22	The Chartered Insurance Institute Hong Kong Limited	Building Core Knowledge Seminar for Insurance Intermediaries *	No	8	5 Feb 2021 - 4 Feb 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Sisi Laksono 25200098
80/38/23	The Chartered Insurance Institute Hong Kong Limited	Digital and Innovation Seminar for Insurance Intermediaries *	No	10	17 Sep 2020 - 16 Sep 2021	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Sisi Laksono 25200098
80/38/25	The Chartered Insurance Institute Hong Kong Limited	Legal and Risks CPD Seminar *	No	14	22 Mar 2021 - 21 Mar 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Sisi Laksono 25200098

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80/38/27	The Chartered Insurance Institute Hong Kong Limited	Mastering High Net Worth *	No	8	27 Apr 2021 - 26 Apr 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Sisi Laksono 25200098
80/38/28	The Chartered Insurance Institute Hong Kong Limited	Construction Risks for the Insurance Practitioners - CAR & EAR	No	12	11 Jun 2021 - 10 Jun 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Sisi Laksono 25200098
80/38/29	The Chartered Insurance Institute Hong Kong Limited	Claims Handling: Essential Laws and Skills	No	12	19 Jul 2021 - 18 Jul 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Sisi Laksono 25200098
80/41/20	Institute of Professional Education and Knowledge (PEAK) of the VTC & General Agents and Managers Association of Hong Kong Limited (GAMAHK)	CPD Seminar 2021 *	No	9	01 Apr 2021 - 31 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/45/08	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)	No	10	16 Jun 2021 - 15 Jun 2022	Public 公眾人士	Ms CHAN CHIN MING 27156671
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)	No	10	16 Jun 2021 - 15 Jun 2022	Public 公眾人士	Ms CHAN CHIN MING 27156671
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)	No	10	07 Jun 2021 - 06 Jun 2022	Public 公眾人士	Ms CHAN CHIN MING 27156671
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	No	10	24 Sep 2020 - 23 Sep 2021	Public 公眾人士	Dr WONG CHI MEI 27156671
80/45/24	The Hong Kong Federation of Trade Unions Occupational Retraining Centre	Insurance and electronic money 保險與電子幣	No	5	1 Nov 2020 - 31 Oct 2021	Public 公眾人士	Dr WONG CHI MEI 27156671

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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) *	No	10	23 Apr 2021 - 22 Apr 2022	Public 公眾人士	Dr WONG CHI MEI 27156671
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)	No	10	23 Apr 2021 - 22 Apr 2022	Public 公眾人士	Dr WONG CHI MEI 27156671
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) *	No	10	23 Apr 2021 - 22 Apr 2022	Public 公眾人士	Dr WONG CHI MEI 27156671
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) *	No	10	23 Apr 2021 - 22 Apr 2022	Public 公眾人士	Dr WONG CHI MEI 27156671
80/74/24	The Hong Kong Institute of Bankers	Banking Services and Professional Ethics *	No	8	15 Aug 2020 - 14 Aug 2021	Public 公眾人士 + Commissioning Body 委託機構員工 + Others: Insurance Brokers	Ms Rita Yeung 2190 7060
80/74/26	The Hong Kong Institute of Bankers	Strive for Communication Excellence *	No	24	14 Sep 2020 - 13 Sep 2021	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 + Others: Insurance Brokers	Ms Rita Yeung 2190 7060
80/74/29	The Hong Kong Institute of Bankers	Certified Private Wealth Professionals (CPWP) Module 2 - Ethics and Compliance *	No	12	1 Oct 2020 - 30 Sep 2021	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 + Others: Insurance Brokers	Ms Rita Yeung 2190 7060

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80/74/32	The Hong Kong Institute of Bankers	Legal & Regulatory Update *	No	4	4 Feb 2021 - 3 Feb 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工 + Others: Insurance brokers	Mr Wallace Hui 21907088
80/74/33	The Hong Kong Institute of Bankers	ECF - Retail Wealth Management (RWM) - Essentials of Banking *	No	15	12 Mar 2021 - 11 Mar 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Henry LEE 2190 7028
80/74/34	The Hong Kong Institute of Bankers	ECF – Retail Wealth Management (RWM) - Investment and Asset Management: Alternatives and Wealth Solutions *	No	15	12 Mar 2021 - 11 Mar 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Henry LEE 2190 7028
80/74/35	The Hong Kong Institute of Bankers	ECF - Retail Wealth Management (RWM) - Investment and Asset Management: Product Solutions *	No	15	12 Mar 2021 - 11 Mar 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Henry LEE 2190 7028
80/74/36	The Hong Kong Institute of Bankers	ECF – Retail Wealth Management (RWM) - Financial Planning and Wealth Management *	No	15	12 Mar 2021 - 11 Mar 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Henry LEE 2190 7028
80/78/12	Hong Kong Financial Services Professional Association Limited	Wealth Management for High-Net Worth (HNW) Clients 高端客戶之財富管理 *	No	10	1 Apr 2021 - 31 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Ricky Lee 2151 2618

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80/78/13	Hong Kong Financial Services Professional Association Limited	Practices of Financial Planning 財務策劃實踐 *	No	15	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Ricky Lee 2151 2618
80/78/14	Hong Kong Financial Services Professional Association Limited	Comprehensive insurance and medical insurance planning 全方位保險及醫保策劃 *	No	14	1 Mar 2021 - 28 Feb 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Ricky Lee 2151 2618
80/78/15	Hong Kong Financial Services Professional Association Limited	Enhancing Wealth Management Skills with Market Analysis 分析市場以加強財務策劃能力 *	No	21	01 Sep 2021 - 31 Aug 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Ricky Lee 2151 2618
80/78/16	Hong Kong Financial Services Professional Association Limited	Long-Term Wealth Management for Client 為客戶長遠規劃財富 *	No	11	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Ricky Lee 2151 2618
80/78/17	Hong Kong Financial Services Professional Association Limited	Enhancing Soft Skills I 提升軟性技巧 I *	No	9	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Ricky Lee 2151 2618
80/78/18	Hong Kong Financial Services Professional Association Limited	Enhancing Soft Skills II 提升軟性技巧 II *	No	12	1 Nov 2020 - 31 Oct 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Ricky Lee 2151 2618
80/78/19	Hong Kong Financial Services Professional Association Limited	Regulations and compliance for insurance industry 保險業相關法規及條例 *	Yes	8	01 Apr 2021 - 31 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Ricky Lee 2151 2618
80/78/21	Hong Kong Financial Services Professional Association Limited	Integrating Legal IQ into insurance business 法商與保險 *	No	8	01 Jun 2021 - 31 May 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Ricky Lee 2151 2618
80/92/02	Institute of Financial Planners of Hong Kong	Practices & Updates in Financial Planning I *	No	45	01 Jul 2021 - 30 Jun 2022	Public 公眾人士	Mr Sam Kong 29827834
80/92/03	Institute of Financial Planners of Hong Kong	Practices & Updates in Financial Planning II *	No	34	01 Apr 2021 - 31 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Sam Kong 29827834
80/92/04	Institute of Financial Planners of Hong Kong	Practices & Updates in Financial Planning III - Investment and Risk Management Series *	No	46	1 Feb 2021 - 31 Jan 2022	Public 公眾人士	Mr Sam Kong 29827834

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80/92/05	Institute of Financial Planners of Hong Kong	Practices & Updates in Financial Planning IV *	No	49	1 Feb 2021 - 31 Jan 2022	Public 公眾人士	Mr Sam Kong 29827834
80/92/06	Institute of Financial Planners of Hong Kong	Practices and Updates in Financial Planning V *	No	45	01 May 2021 - 30 Apr 2022	Public 公眾人士	Mr Sam Kong 29827834
80/92/07 Renewed	Institute of Financial Planners of Hong Kong	Practices & Updates in Financial Planning VI *	No	54	01 Sep 2021 - 31 Aug 2022	Public 公眾人士	Mr Sam Kong 29827834
80/92/08	Institute of Financial Planners of Hong Kong	Practices & Updates in Financial Planning VII *	No	62	1 Nov 2020 - 31 Oct 2021	In-house 內部員工 + Public 公眾人士	Mr Sam Kong 29827834
80/92/10	Institute of Financial Planners of Hong Kong	Practices and Updates in Financial Planning IX *	No	10	1 Oct 2020 - 30 Sep 2021	Public 公眾人士	Mr Sam Kong 29827834
80/131/06	BMI Professional Training Centre Limited	Market Updates for Insurance and Ethics or Regulations *	No	12	23 Dec 2020 - 22 Dec 2021	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Meko CHOW 25939645
80/154/03	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)	No	10	25 Mar 2021 - 24 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms CHAN MING LING, EVA 90801696
80/154/06	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 *	No	5	25 Mar 2021 - 24 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms CHAN MING LING, EVA 90801696
80/155/03	Universal Prestige Institute	Professional Will Writing for Insurance Intermediaries	No	10	21 Jun 2021 - 20 Jun 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Sara TSUI 5403 3303
80/155/09	Universal Prestige Institute	The effective communication, personality analysis and sales technique for insurance intermediaries 保險中介的有效溝通・性格分析和銷售技巧課程 *	No	8	09 Jul 2021 - 08 Jul 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Sara TSUI 5403 3303
80/155/11	Universal Prestige Institute	Trust and Succession Wealth Management in Hong Kong and the PRC 香港及中國信託與傳承財富管理 *	No	10	25 May 2021 - 24 May 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Sara TSUI 5403 3303

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80/160/06	Heepon Company Limited	Issues in General Insurance and Insurance Practice 一般保險及實踐之論題 *	No	24	20 Jun 2021 - 19 Jun 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr RAYMOND WONG 61038938
80/160/07	Heepon Company Limited	Issues around Benefits and Insurances of the Person 人身保險及利益之論題 *	No	16	20 May 2021 - 19 May 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr RAYMOND WONG 61038938
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 *	No	10	15 Jan 2021 - 14 Jan 2022	Public 公眾人士	Mr Kong Fat WONG 97326909
80/177/04	VIP Consultancy Ltd	Employee Compensation and Negligence Claims 僱員補償與疏忽索償 *	No	10	21 Nov 2020 - 20 Nov 2021	Public 公眾人士	Mr Wong Kong Fat 9732 6909
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 *	No	39	02 Jul 2021 - 01 Jul 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Ling SO 21707972
80/195/03	Enrich Culture Group	Wealth Management Series 1 財富管理-富足規劃系列一 *	No	8	26 Feb 2021 - 25 Feb 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Ling SO 21707972
80/195/04	Enrich Culture Group	Medical & Health Planning CPD Series 醫療及健康規劃CPD培訓課程 *	No	8	1 Jan 2021 - 31 Dec 2021	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Ling So 21707972
80/199/02	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 *	No	3	25 Apr 2021 - 24 Apr 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Ming Kit WONG 60153603
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 *	No	21	23 Apr 2021 - 22 Apr 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/227/02	Vista Academy Co Limited	Insurance Management and Legal Studies Series *	No	12	17 Jun 2021 - 16 Jun 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Annie LEUNG 55019366
80/227/03	Vista Academy Co Limited	Personal Lines and SME Insurance Series *	No	12	01 Jul 2021 - 30 Jun 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Annie LEUNG 55019366

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80/231/02	Midland University Limited	認識業主面對的風險以拓展保險業務	No	2	06 Mar 2021 - 05 Mar 2022	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Miss Peony WAN 23168880
80/236/12	HKPC Academy of Hong Kong Productivity Council	New Finance – Behavioural Finance & Sustainable Investments 新金融學 - 行為金融及可持續投資 *	No	9	24 Mar 2021 - 23 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr CHOW Sai Ho, Marius 2788 5816
80/236/13	HKPC Academy of Hong Kong Productivity Council	Sustainable Business Development and Effective Team Management 可持續業務發展與實效團隊管理 *	No	9	24 Mar 2021 - 23 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr CHOW Sai Ho, Marius 2788 5816
80/236/14	HKPC Academy of Hong Kong Productivity Council	Ethics & Regulations for Insurance & Finance Professionals 保險金融從業員的道德與規例要求 *	No	12	24 Mar 2021 - 23 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr CHOW Sai Ho, Marius 2788 5816
80/236/15	HKPC Academy of Hong Kong Productivity Council	Project Investments & Financial Freedom 項目投資與財務自由 *	No	9	24 Mar 2021 - 23 Mar 2022	Public 公眾人士 + Commissioning Body 委託機構員工	Mr CHOW Sai Ho, Marius 2788 5816