

## 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)

Reference No. 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	Validity Period 有效期	Contact 聯絡方法	Remarks 備註
80/06/37	HKSI	Overview of the new regulatory framework under Insurance Ordinance	2	14 Sep 2020 – 31 Oct 2020	Ms Carina Yuen 3120 6203	Apply online: <a href="https://www.hksi.org/en/development/activities/1006834-webinar-overview-of-the-regulatory-framework-under-insurance-ordinance/">https://www.hksi.org/en/development/activities/1006834-webinar-overview-of-the-regulatory-framework-under-insurance-ordinance/</a>
80/24/59	IfE, PolyU	Market Updates for Insurance Professional 2020 – Family Law for Insurance Practitioners	2	Until 31 Oct 2020	Tel: 3400 2773 Email: <a href="mailto:ife.cdt@polyu.edu.hk">ife.cdt@polyu.edu.hk</a> Whatsapp: 6722 0815	Apply online: <a href="https://www.polyu.edu.hk/ife/corp/en/corporate_training/elearning6.php">https://www.polyu.edu.hk/ife/corp/en/corporate_training/elearning6.php</a>
80/24/59	IfE, PolyU	Market Updates for Insurance Professional 2020 – The Path to Success for Insurance Practitioners	3	Until 31 Oct 2020	Tel: 3400 2773 Email: <a href="mailto:ife.cdt@polyu.edu.hk">ife.cdt@polyu.edu.hk</a> Whatsapp: 6722 0815	Apply online: <a href="https://www.polyu.edu.hk/ife/corp/en/corporate_training/cpd2.php">https://www.polyu.edu.hk/ife/corp/en/corporate_training/cpd2.php</a>

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80/24/60	IfE, PolyU	2020 Market Updates for Financial Practitioners – Psychology Skills for Wealth Management	2	29 Oct 2020	Tel: 3400 2773 Email: <a href="mailto:ife.cdt@polyu.edu.hk">ife.cdt@polyu.edu.hk</a> Whatsapp: 6722 0815	Apply online: <a href="https://www.polyu.edu.hk/ife/corp/en/corporate_training/elearning5.php">https://www.polyu.edu.hk/ife/corp/en/corporate_training/elearning5.php</a>
80/24/60	IfE, PolyU	2020 Market Updates for Financial Practitioners – The Latest Development and Regulation Updates of Insurance Authority	2	Until 31 Oct 2020	Tel: 3400 2773 Email: <a href="mailto:ife.cdt@polyu.edu.hk">ife.cdt@polyu.edu.hk</a> Whatsapp: 6722 0815	Apply online: <a href="https://www.polyu.edu.hk/ife/corp/en/corporate_training/elearning2.php">https://www.polyu.edu.hk/ife/corp/en/corporate_training/elearning2.php</a>
80/24/60	IfE, PolyU	2020 Market Updates for Financial Practitioners – Fraud and Money Laundering Risks in FinTech	3	Until 31 Oct 2020	Tel: 3400 2773 Email: <a href="mailto:ife.cdt@polyu.edu.hk">ife.cdt@polyu.edu.hk</a> Whatsapp: 6722 0815	Apply online: <a href="https://www.polyu.edu.hk/ife/corp/en/corporate_training/cpd1.php">https://www.polyu.edu.hk/ife/corp/en/corporate_training/cpd1.php</a>
80/38/23	CII HK	Digital and Innovation Seminar for Insurance Intermediaries *	10	Until 31 Oct 2020	Ms Sisi Laksono 2520 0098	Course details & application link: <a href="https://www.ciigroup.org/apac/events/training-courses-and-cpd/">https://www.ciigroup.org/apac/events/training-courses-and-cpd/</a>

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80/92/02	IFPHK	Practices and Updates in Financial Planning I *	51	Until 31 Oct 2020	Ms Kasia Cheung 2982 7861	Available modules: <a href="http://www.ifphk.org/CEP/ce-calendar">http://www.ifphk.org/CEP/ce-calendar</a> Interested individuals may contact the organizer for more details regarding the schedule of all modules under this Activity.
80/92/03	IFPHK	Practices and Updates in Financial Planning II *	60	Until 31 Oct 2020	Ms Kasia Cheung 2982 7861	Available modules: <a href="http://www.ifphk.org/CEP/ce-calendar">http://www.ifphk.org/CEP/ce-calendar</a> Interested individuals may contact the organizer for more details regarding the schedule of all modules under this Activity.
80/92/04	IFPHK	Practices & Updates in Financial Planning III - Investment and Risk Management Series *	71	Until 31 Oct 2020	Ms Kasia Cheung 2982 7861	Available modules: <a href="http://www.ifphk.org/CEP/ce-calendar">http://www.ifphk.org/CEP/ce-calendar</a> Interested individuals may contact the organizer for more details regarding the schedule of all modules under this Activity.

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80/92/05	IFPHK	Practices and Updates in Financial Planning IV *	62	Until 31 Oct 2020	Ms Kasia Cheung 2982 7861	Available modules: <a href="http://www.ifphk.org/CEP/ce-calendar">http://www.ifphk.org/CEP/ce-calendar</a> Interested individuals may contact the organizer for more details regarding the schedule of all modules under this Activity.
80/92/06	IFPHK	Practices and Updates in Financial Planning V *	65	Until 31 Oct 2020	Ms Kasia Cheung 2982 7861	Available modules: <a href="http://www.ifphk.org/CEP/ce-calendar">http://www.ifphk.org/CEP/ce-calendar</a> Interested individuals may contact the organizer for more details regarding the schedule of all modules under this Activity.
80/92/07	IFPHK	Practices and Updates in Financial Planning VI *	69	Until 31 Oct 2020	Ms Kasia Cheung 2982 7861	Available modules: <a href="http://www.ifphk.org/CEP/ce-calendar">http://www.ifphk.org/CEP/ce-calendar</a> Interested individuals may contact the organizer for more details regarding the schedule of all modules under this Activity.

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80/92/08	IFPHK	Practices and Updates in Financial Planning VII *	62	Until 31 Oct 2020	Ms Kasia Cheung 2982 7861	Available modules: <a href="http://www.ifphk.org/CEP/ce-calendar">http://www.ifphk.org/CEP/ce-calendar</a> Interested individuals may contact the organizer for more details regarding the schedule of all modules under this Activity.
80/92/10	IFPHK	Practices and Updates in Financial Planning IX *	10	Until 30 Sep 2020	Ms Kasia Cheung 2982 7861	Available modules: <a href="http://www.ifphk.org/CEP/ce-calendar">http://www.ifphk.org/CEP/ce-calendar</a> Interested individuals may contact the organizer for more details regarding the schedule of all modules under this Activity.
80/129/04	Altruist Concepts Limited	A Refresher Toolkit for Insurance Practitioners *	10	1 Sep 2020 – 31 Oct 2020	Mr Alex Choi 2892 1818	Interested individuals may send an e-mail to <a href="mailto:training@altruist.com.hk">training@altruist.com.hk</a> for application.
80/141/02	HKCII	香港保險中介人商會 持續專業發展課程 *	24	13 Aug 2020 – 31 Oct 2020	Mr Otto Li 6683 5528	Course details and & application link: <a href="http://www.hkcii.org/index.php?page=continuing-professional-development-cpd-second-term-2020">http://www.hkcii.org/index.php?page=continuing-professional-development-cpd-second-term-2020</a>

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80/144/02	IARFC	Certificate in Financial Consulting (Executive Program)	14	29 Jul 2020 – 31 Oct 2020	Mr Allan Wan 3152 2314	Course details: <a href="http://www.iarfc-hk.org/index_in_cat.php?cat_id=236">http://www.iarfc-hk.org/index_in_cat.php?cat_id=236</a>
80/154/03	APEC Education Limited	China Political and Economical Series -- - The Opportunity for Financial Planner	10	Until 31 Oct 2020	Ms Chan Ming Ling, Eva 9080 1696	Please contact Ms Chan Ming Ling, Eva on 9080 1696 for application
80/177/03	VIP Consultancy Ltd	Motor Insurance (Third Party Risk) Ordinance and Motor Insurance Policy	10	Until 31 Oct 2020	Mr Wong Kong Fat 9732 6909	Please contact Ms Charise Leung on 6163 8677 for application
80/227/02	Vista Academy Co Limited	Insurance Management and Legal Studies Series *	12	Until 31 Oct 2020	Ms Rachael Lai 5501 9366	Course details: <a href="http://vista-academy.com.hk/Vista-Academy-CPD-Courses/">http://vista-academy.com.hk/Vista-Academy-CPD-Courses/</a> To apply online/send the application by post: <a href="http://vista-academy.com.hk/Online-Application/">http://vista-academy.com.hk/Online-Application/</a>

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80/227/03	Vista Academy Co Limited	Personal Lines and SME Insurance series *	10	Until 31 Oct 2020	Ms Rachael Lai 5501 9366	Course details: <a href="http://vista-academy.com.hk/Vista-Academy-CPD-Courses/">http://vista-academy.com.hk/Vista-Academy-CPD-Courses/</a> To apply online/send the application by post: <a href="http://vista-academy.com.hk/Online-Application/">http://vista-academy.com.hk/Online-Application/</a>
80/236/08	HKPC	AMLO Statutory Requirements & Update	3	Until 31 Oct 2020	Mr Marius Chow 2788 5816	Apply online: <a href="https://www.home.hkpcacademy.org/cpd/">https://www.home.hkpcacademy.org/cpd/</a>
80/236/09	HKPC	Code of Conduct for Licensed Insurance Agents	3	Until 31 Oct 2020	Mr Marius Chow 2788 5816	Apply online: <a href="https://www.home.hkpcacademy.org/cpd/">https://www.home.hkpcacademy.org/cpd/</a>
80/236/10	HKPC	How to reach Financial Freedom	3	Until 31 Oct 2020	Mr Marius Chow 2788 5816	Apply online: <a href="https://www.home.hkpcacademy.org/cpd/">https://www.home.hkpcacademy.org/cpd/</a>
80/236/11	HKPC	Finance Technological Crime and Loss Prevention	3	Until 31 Oct 2020	Mr Marius Chow 2788 5816	Apply online: <a href="https://www.home.hkpcacademy.org/cpd/">https://www.home.hkpcacademy.org/cpd/</a>

**Notes:**

Please note that this list only captures courses that are currently on offer. Expired or completed courses will not be shown.

# Full name of organizers:

- (a) HKSI: Hong Kong Securities and Investment Institute 香港證券及投資學會
- (b) IfE, PolyU: The Institute for Entrepreneurship of The Hong Kong Polytechnic University 香港理工大學企業發展院
- (c) CII HK: The Chartered Insurance Institute Hong Kong Limited 英國特許保險學院
- (d) IFPHK: Institute of Financial Planners of Hong Kong 香港財務策劃師學會
- (e) Altruist Concepts Limited: 進邦概念有限公司
- (f) HKCII: Hong Kong Chamber of Insurance Intermediaries 香港保險中介人商會
- (g) IARFC: International Association of Registered Financial Consultants HK and Macau Centre Company Limited 國際認證財務顧問師協會
- (h) APEC Education Limited: 亞太教育培訓有限公司
- (i) VIP Consultancy Ltd: 弘雋培訓有限公司
- (j) Vista Academy Co Limited: 偉思培訓中心有限公司
- (k) HKPC: HKPC Academy of Hong Kong Productivity Council 香港生產力促進局

\* 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.