

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.

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
80/02/32	ING Life Insurance Company (Bermuda) Limited	ING Sales Congress	5	May 2011 - Apr 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Rex Ip 2281 2709

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80/02/52	ING Life Insurance Company (Bermuda) Limited	理財顧問專業操守系列 Professional Practice Series*	8	Sep 2011 - Aug 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Ms May Poon 2281 2719
80/02/53	ING Life Insurance Company (Bermuda) Limited	Financial Planning Training Program (FPT) 理財策劃深造訓練課程*	24	Oct 2011- Sep 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Christine Ng 2281 2705
80/02/54	ING Life Insurance Company (Bermuda) Limited	Needs Based Selling Series 理財需要導向銷售系列*	16	Oct 2011- Sep 2012	In-house 內部員工 + Commissioning Body 委託機構員工 + Business Partners 商業夥伴	Ms Caroline Ma 2281 2720
80/02/55	ING Life Insurance Company (Bermuda) Limited	Exploring Market Series 探索市場理財需要系列*	24	Jan 2012 – Dec 2012	In-house 內部員工 + Commissioning Body 委託機構員工 + Business Partners 商業夥伴	Mr Steven Luk 2281 2722

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80/02/56	ING Life Insurance Company (Bermuda) Limited	IL-CPD-01 至 08: 提升版 投資相連保險試卷額外 單元(特定專業培訓時數) 系列 IL-CPD-01 to 08: Additional Modules of Enhanced Version of Investment-linked Long Term Insurance Exam (IL- CPD hours) Series *	20	Aug 2011 – Jul 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Pun Meng In 2281 2723
80/02/57	ING Life Insurance Company (Bermuda) Limited	ING Bancassurance Academy Workshop *	40	Jun 2011 – May 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Steven Kwok 2850 3326
80/02/58 New	ING Life Insurance Company (Bermuda) Limited	Need Based Approach in Conducting Critical Illness Protection Business (危疾保障需求銷售)*	8	Mar 2012 – Feb 2013	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Steven Kwok 2850 3326
80/04/02	MassMutual Asia Ltd	Legal Aspect of Insurance	13	May 2011 - Apr 2012	In-house 內部員工	Mr Keith Ng 2919 9262

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80/04/04	MassMutual Asia Ltd	Fundamental Agency Management Training	6.5	Jan 2012 – Dec 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Keith Ng 2919 9262
80/04/05	MassMutual Asia Ltd	Investment-Linked Insurance Training	6.5	Jan 2012 – Dec 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Keith Ng 2919 9262
80/04/09	MassMutual Asia Ltd	Investment Seminar*	24	Jan 2012 – Dec 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Keith Ng 2919 9262
80/04/11	MassMutual Asia Ltd	Advanced Insurance Seminar*	6	Oct 2011 – Sep 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Keith Ng 2919 9262

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80/04/13	MassMutual Asia Ltd	Financial Planning Series*	38	Oct 2011 – Sep 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Keith Ng 2919 9262
80/04/14	MassMutual Asia Ltd.	Handling Objection Workshop	3	Oct 2011 – Sep 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Keith Ng 2919 9262
80/04/15	MassMutual Asia Ltd.	Medical & Health Insurance Training Series*	16	Jan 2012 – Dec 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Keith Ng 2919 9262
80/04/17	MassMutual Asia Ltd.	Financial Need Analysis Training Series*	6	Oct 2011 – Sep 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Keith Ng 2919 9262
80/04/18	MassMutual Asia Ltd.	Marketing to Women Program –Selling Workshop	3	Jul 2011 – Jun 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Keith Ng 2919 9262

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80/04/19	MassMutual Asia Ltd.	Marketing to Women Program –Recruitment Workshop	3	Jul 2011 – Jun 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Keith Ng 2919 9262
80/04/21	MassMutual Asia Ltd.	Enhancing Your Selling Efficiency*	8	Jan 2012 – Dec 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Keith Ng 2919 9262
80/04/24	MassMutual Asia Ltd.	SuperRecruiter Program	13	Jan 2012 – Dec 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Keith Ng 2919 9262
80/04/25	MassMutual Asia Ltd.	Extra 20 Hours IL CPD (01-08) Insurance Training*	20	Jun 2011- May 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Keith Ng 2919 9262
80/04/26	MassMutual Asia Ltd.	ECA Training for MPF Intermediaries	2	Oct 2011 – Sep 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Keith Ng 2919 9262

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80/04/27	MassMutual Asia Ltd.	Portfolio Expert System	2	Jan 2012 – Dec 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Keith Ng 2919 9262
80/04/28	MassMutual Asia Ltd	Prospecting Workshop 《尋找客源工作坊》	3	Feb 2012 – Jan 2013	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Keith Ng 2919 9262
80/05/02	American International Assurance Company (Bermuda) Ltd	Licensing Course for Paper 2 - General Insurance Examination 《牌照課程 – 試卷二： 一般保險》	6.5	Jan 2012 – Dec 2012	In-house 內部員工	Ms Mandy Yip 2203 0199
80/05/03	American International Assurance Company (Bermuda) Ltd	Licensing Course for Paper 4 - Mandatory Provident Fund Intermediaries Examination 《牌照課程 – 試卷四： 強制性公積金計劃》	6.5	Jan 2012 – Dec 2012	In-house 內部員工	Ms Mandy Yip 2203 0199
80/05/10	American International Assurance Company (Bermuda) Ltd	Licensing Course for Paper 5 - Investment- Linked Long Term Insurance Examination	6.5	Mar 2012 – Feb 2013	In-house 內部員工	Mr John Wong 2881 4016

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80/05/33	American International Assurance Company (Bermuda) Ltd.	Financial Planner Trainee Program	8	Jan 2012 – Dec 2012	In-house 內部員工	Mr Alan Tsang 2881 4013
80/05/36 Renewed	American International Assurance Company (Bermuda) Ltd.	The Essential Agency Management(T.E.A.M) *	13	Mar 2012 – Feb 2013	In-house 內部員工	Ms Irene Chan 2881 4023
80/05/39	American International Assurance Company (Bermuda) Ltd.	Closing and Managing Concerns Training	3	Sep 2011 – Aug 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Steven Fong 2881 4449
80/05/45	American International Assurance Company (Bermuda) Ltd.	Wealth Management Training Series - Investment Knowledge	3.5	Mar 2012 – Feb 2013	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Steven Fong 2881 4449
80/05/50	American International Assurance Company (Bermuda) Ltd	Customer Relationship Enhancement Integrated with Technology	4	Dec 2011 – Nov 2012	In-house 內部員工	Ms Mandy Yip 2881 0199
80/05/57	American International Assurance Company (Bermuda) Ltd	Financial Health Check System - Needs Based Selling	3.5	May 2011 – Apr 2012	In-house 內部員工	Mr Steven Fong 2881 4449
80/05/72	American International Assurance Company (Bermuda) Ltd	Retirement Planning Workshop	3.5	Jan 2012 – Dec 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Benny Tan 2881 4022

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80/05/77 Renewed	American International Assurance Company (Bermuda) Ltd	Best Practices - Selling on a Winning Ground	3.5	Mar 2012 – Feb 2013	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Nicole Chow 2881 3529
80/05/81	American International Assurance Company (Bermuda) Ltd	Financial Health Check Skills - Income Protection	3.5	May 2011 – Apr 2012	In-house 內部員工	Mr Steven Fong 2881 4449
80/05/91	American International Assurance Company (Bermuda) Ltd	Child Education Fund Planning Workshop (子女教育基金策劃工 作坊)	3.5	Feb 2012 – Jan 2013	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Benny Tan 2881 4022
80/05/93	American International Assurance Company (Bermuda) Ltd	Professional Claims Services - Critical Illness	3.5	Aug 2011 – Jul 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Wu Lap Hong 2881 4005
80/05/99	American International Assurance Company (Bermuda) Ltd	Professional Claims Series - Hospitalization	3.5	May 2011 – Apr 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Wu Lap Hong 2881 4005
80/05/101	American International Assurance Company (Bermuda) Ltd	Bank Elite Orientation and Exploration*	6	May 2011 – Apr 2012	In-house 內部員工	Mr Steven Fong 2881 4449

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80/05/102	American International Assurance Company (Bermuda) Ltd	Effective Market Development Workshop	3.5	Oct 2011 – Sep 2012	In-house 內部員工 + Insurance brokers (with business partnership with AIA)	Benny Tan 2881 4022
80/05/104	American International Assurance Company (Bermuda) Ltd	Capital Investment Entrant Scheme (CIES) Training Program	2.5	Oct 2011 – Sep 2012	In-house 內部員工	Ms Dionne So 2881 4035
80/05/105	American International Assurance Company (Bermuda) Ltd	“YES” Program – 成功保險銷售加油站	3.5	1 Oct 2010 – 25 May 2011	In-house 內部員工 + Insurance agents/Brokers and agents from partner’s bank	Mr Benny Tan 2881 4022
80/05/107 Renewed	American International Assurance Company (Bermuda) Ltd	iCareer Workshop	3.5	Mar 2012 – Feb 2013	In-house 內部員工	Ms. Irene Chan 2881 4023
80/05/109 Renewed	American International Assurance Company (Bermuda) Ltd	iLeader 2 Workshop	3	Mar 2012 – Feb 2013	In-house 內部員工	Ms Irene Chan 2881 4023

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80/05/110	American International Assurance Company (Bermuda) Ltd	“YES” – Agency Revitalization Program	3.5	26 May 2011 – 30 Sep 2012	In-house 內部員工	Mr Thomas Lo 2881 4038
		Unleashing Potential		May 2011 – Apr 2012		
80/05/112	American International Assurance Company (Bermuda) Ltd	Telemarketing Skill Workshop – Direct Sales Program	2	Jun 2011 – May 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Suki Lau 3108 1128
80/05/113	American International Assurance Company (Bermuda) Ltd	Cold Calling Skill Workshop – Appointment Making Program	5	Jun 2011 – May 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Suki Lau 3108 1128
80/05/114	American International Assurance Company (Bermuda) Ltd	Selling by Attraction Workshop	7	Jun 2011 – Aug 2011	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Benny Tan 2881 4022

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80/05/115	American International Assurance Company (Bermuda) Ltd	Investment Risk Management Workshop	3	Sep 2011- Aug 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Steven Fong 2881 4449
80/05/116	American International Assurance Company (Bermuda) Ltd	環球財務學課程 2011	10	Sep 2011 – Aug 2012	In-house 內部員工	Mr Johnny Cheng 9437 3867
80/05/117	American International Assurance Company (Bermuda) Ltd	Wealth Management and Protection Training - Core	10	Dec 2011 – Nov 2012	In-house 內部員工 + Public 公眾人士	Mr Steven Fong 2881 4449
80/05/118	American International Assurance Company (Bermuda) Ltd	iLeader 1 Workshop	3.5	Feb 2012 – Jan 2013	In-house 內部員工	Ms Irene Chan 2881 4023
80/05/119 New	American International Assurance Company (Bermuda) Ltd	Total Protection - Bridge the Gap workshop	3.5	Apr 2012 – Mar 2013	In-house 內部員工	Mr Wu Lap Hong 2881 4005

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80/06/04 Renewed	Hong Kong Securities Institute	Overview of Legal and Regulatory Framework for Securities and Futures Industry*	15	May 2012 – Apr 2013	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Spencer Lau 3120 6188
80/06/08	Hong Kong Securities Institute	Insurance and MPF Series*	14	Aug 2011 – Jul 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Spencer Lau 3120 6188
80/06/10	Hong Kong Securities Institute	Leadership for 21st Century: Relational Leadership	7.5	Apr 2012 – Mar 2013	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Spencer Lau 3120 6188
80/06/14	Hong Kong Securities Institute	Insurance and MPF Series II*	6	Aug 2011 – Jul 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Spencer Lau 3120 6188

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80/06/16 Renewed	Hong Kong Securities Institute	Modern Investment Analysis and Tools - Series II*	18	May 2012 – Apr 2013	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Spencer Lau 3120 6188
80/06/17	Hong Kong Securities Institute	CPT/CPD Series III*	11	Feb 2012 – Jan 2013	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Spencer Lau 3120 6188
80/06/19	Hong Kong Securities Institute	Insurance and MPF Series III*	8	Sep 2011- Aug 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Spencer Lau 3120 6188
80/06/20	Hong Kong Securities Institute	CPT/CPD Series IV*	22	Jan 2012 – Dec 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Spencer Lau 3120 6188
80/06/22	Hong Kong Securities Institute	CPT/CPD Series V *	8	Mar 2012 – Feb 2013	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Spencer Lau 3120 6188

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80/06/23	Hong Kong Securities Institute	Compliance Training Series I*	7	Mar 2012 – Feb 2013	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Spencer Lau 3120 6188
80/06/24	Hong Kong Securities Institute	ECA Training for MPF Intermediaries	2	Aug 2011 – Jul 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Spencer Lau 3120 6188
80/06/25 New	Hong Kong Securities Institute	Compliance Training Series II*	8	Mar 2012 – Feb 2013	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Spencer Lau 3120 6188
80/07/04	Institute of Professional Education and Knowledge, VTC	Insurance Industry Regulatory Compliance*	10	Feb 2012– Jan 2013	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Hedley Chow 2836 1864
80/07/05	Institute of Professional Education and Knowledge, VTC	MPF Updates for Individual Intermediaries	2	Jan 2012 – Dec 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822

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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)*	16	Feb 2012 – Jan 2013	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Eddy Lau 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	Mar 2012 – Feb 2013	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Eddy Lau 2836 1863
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	Mar 2012– Feb 2013	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Eddy Lau 2836 1863

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80/07/10	Institute of Professional Education and Knowledge, VTC	Certificate Course in Legal Liability*	30	May 2011 – Apr 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Eddy Lau 2836 1863
80/07/12	Institute of Professional Education and Knowledge, VTC	Legal Knowledge for Life Insurance Selling (with optional module of Basic Financial Planning)*	14	Jun 2011 – May 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Hedley Chow 2836 1864
80/07/13	Institute of Professional Education and Knowledge, VTC	Certificate Course in Insurance of Financial Risk*	15	May 2011 – Apr 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Eddy Lau 2836 1863

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80/07/14	Institute of Professional Education and Knowledge, VTC	Commercial Insurance And Related Legal Provisions (with optional modules 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	Sep 2011 – Aug 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Eddy Lau 2836 1863

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80/07/16	Institute of Professional Education and Knowledge, VTC	<p>“Statutory Insurance – Motor” with Optional Modules of "Insurance Policy Drafting and Underwriting” and/or “Motor Vehicle Damage Surveying” and/or “Introduction to Claims”</p> <p>《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》*</p>	15	Oct 2011 – Sep 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Eddy Lau 2836 1863
80/07/18	Institute of Professional Education and Knowledge, VTC	Financial Planning (Estate Planning Inheritance and Probate) with optional module “Legal Principles Applicable to Life Insurance” *	10	Oct 2011 – Sep 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Hedley Chow 2836 1864

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80/07/19	Institute of Professional Education and Knowledge, VTC	"Most Recently Enacted Law Relating to Insurance" with Optional Module "Common Law Principles of Insurance" *	15	Nov 2011- Oct 2012	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》*	15	Oct 2011 – Sep 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Eddy Lau 2836 1863
80/07/26	Institute of Professional Education and Knowledge, VTC	Law Relating to Asset Protection *	10	Mar 2012 – Feb 2013	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Hedley Chow 2836 1864

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80/07/27	Institute of Professional Education and Knowledge, VTC	Duties of Fiduciaries - Agents, Trustees and Directors with optional module of Criminal Law Relating to Insurance*	15	Sep 2011 – Aug 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Hedley Chow 2836 1864
80/07/28 Renewed	Institute of Professional Education and Knowledge, VTC	Technical Analysis*	16	Apr 2012 – Mar 2013	Public 公眾人士	Ms Polly Tam 2836 1822
80/07/29	Institute of Professional Education and Knowledge, VTC	Managing Self and Relationship through Enneagram*	16	Mar 2012 – Feb 2013	In-house 內部員工 + Public 公眾人士	Mr Raymond Chan 2836 1854
80/07/31	Institute of Professional Education and Knowledge, VTC	Understanding Insurance Clients (Building Construction Industry)*	15	Oct 2011 – Sep 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Hedley Chow 2836 1864
80/07/32	Institute of Professional Education and Knowledge, VTC	Compliance for Securities and Futures Industry Practitioners*	26	Dec 2011 – Nov 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822

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80/07/33	Institute of Professional Education and Knowledge, VTC	Customer Relationship Management*	16	Feb 2012 – Jan 2013	Public 公眾人士	Mr Y.K. Chau 2836 1834
80/07/34	Institute of Professional Education and Knowledge, VTC	Compliance Issues for Bank Front-Line Staff *	16	Mar 2012 – Feb 2013	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/37 Renewed	Institute of Professional Education and Knowledge, VTC	Boost your work competence with NLP*	16	Apr 2012 – Mar 2013	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/38	Institute of Professional Education and Knowledge, VTC	Enneagram (Practical Application)*	16	May 2011 – Apr 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chan 2836 1854
80/07/39	Institute of Professional Education and Knowledge, VTC	Modern Leadership and Staff Management in Insurance Industry*	16	Oct 2011- Sep 2012	Public 公眾人士	Mr Raymond Chan 2836 1854

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80/07/41	Institute of Professional Education and Knowledge, VTC	Health Insurance*	16	Jan 2012 – Dec 2012	In-house 內部員工 + Public 公眾人士	Mr Hedley Chow 2836 1864

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80/07/42	Institute of Professional Education and Knowledge, VTC	“Communicating without Talking” for Insurance Practitioners *	8	Dec 2011 – Nov 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chan 2836 1854
80/07/47	Institute of Professional Education and Knowledge, VTC	Financial Planning (Mutual Funds and Equity Securities) 財務策劃 (基金和證券投資)*	15	Jul 2011 – Jun 2012	Public 公眾人士	Mr Hedley Chow 2836 1864
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	Sep 2011 – Aug 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
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	Mar 2012 – Feb 2013	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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80/07/51	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	Jan 2012 – Dec 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/52 Renewed	Institute of Professional Education and Knowledge, VTC	Travel Insurance*	12	Apr 2012 – Mar 2013	Public 公眾人士	Mr Hedley Chow 2836 1864

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80/07/53	Institute of Professional Education and Knowledge, VTC	Leadership & Management Techniques for Insurance Industry*	16	May 2011 – Apr 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chan 2836 1854
80/07/55	Institute of Professional Education and Knowledge, VTC	Advanced Technical Analysis 股市技術分析進階 課程*	16	May 2011 – Apr 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/56	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	May 2011 – Apr 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
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	Sep 2011 – Aug 2012	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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80/07/58	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*	16	Oct 2011 – Sep 2012	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	Jan 2012 – Dec 2012	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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80/07/60	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	Jan 2012 – Dec 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/62	Institute of Professional Education and Knowledge, VTC	銷售奇才研習坊(保險 及投資專業人士) Selling Genius Workshop (Insurance & Investment Professionals)*	16	May 2011 – Apr 2012	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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80/07/63	Institute of Professional Education and Knowledge, VTC	Current Development on Investment Products Module 6-8 投資產品發展近況單元 6-8*	16	May 2011 – Apr 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/64	Institute of Professional Education and Knowledge, VTC	Branch Banking Operation Overview for Insurance Practitioners 銀行分行運作概覽(保 險從業員)	2	Jun 2011 – May 2012	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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80/07/65	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	Sep 2011 – Aug 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/66	Institute of Professional Education and Knowledge, VTC	Investment Strategies Series 投資策略系列*	16	Dec 2011 – Nov 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822

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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	Feb 2012 – Jan 2013	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/68	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)*	11	Feb 2012 – Jan 2013	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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80/07/69	Institute of Professional Education and Knowledge, VTC	Investing in Commodities Series 商品投資系列*	16	Jun 2011 – May 2012	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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80/07/70	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	Jun 2011 – May 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/71	Institute of Professional Education and Knowledge, VTC	Persuasion Skills for Financial Professionals 說服技巧(金融服務業專才)*	16	Sep 2011 – Aug 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/07/72	Institute of Professional Education and Knowledge, VTC	Asian Securities Markets 亞洲證券市場	8	Oct 2011 – Sep 2012	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	Nov 2011 – Oct 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822

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80/07/74	Institute of Professional Education and Knowledge, VTC	Trade Treasure Case-based Training Programme for Financial Service Professionals 企業智庫個案研習課程 (金融服務專業人士)*	15	Nov 2011 – Oct 2012	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*	8	Jan 2012 – Dec 2012	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	Jan 2012 – Dec 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/08/02	Hang Seng Bank Ltd	Selling Insurance Products*	16	May 2011 – Apr 2012	In-house 內部員工	Mr Kelvin Mok 3662 5305
80/08/16	Hang Seng Bank Ltd	Policy Servicing & Claims - Life Insurance	4	May 2011 – Apr 2012	In-house 內部員工	Mr Kelvin Mok 3662 5305
80/08/49	Hang Seng Bank Ltd	Value Selling	2	Jun 2011 – May 2012	In-house 內部員工	Mr Henry Lee 3662 5304
80/08/50	Hang Seng Bank Ltd	Insurance Planning for High Net Worth Clients*	10	Jun 2011 – May 2012	In-house 內部員工	Mr Alvin Tse 3662 5310
80/08/51	Hang Seng Bank Ltd	Leading Young Generation for High Performance	8	Feb 2012 – Jan 2013	In-house 內部員工	Ms Lisa WY Ng 3662 5289

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80/08/52	Hang Seng Bank Ltd	Performance Management *	8	Feb 2012 – Jan 2013	In-house 內部員工	Ms Lisa WY Ng 3662 5289
80/08/53	Hang Seng Bank Ltd	Trade Account Planning and Wallet Sizing*	4	Mar 2012 – Feb 2013	In-house 內部員工	Ms Lisa WY Ng 3662 5289
80/08/54 New	Hang Seng Bank Ltd	Achieving Excellence in Cross Selling	10	Apr 2012 – Mar 2013	In-house 內部員工	Ms Louisa Wong 3662 5307
80/10/16	Ageas Insurance Company (Asia) Ltd (former:Fortis Insurance Company (Asia) Limited)	Ageas Intermediary Development Course*	13	Jan 2012 – Dec 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Kristen Suen 2625 6334
80/10/17	Ageas Insurance Company (Asia) Ltd (former:Fortis Insurance Company (Asia) Limited)	Management Enhancement Program*	16	Jan 2012 – Dec 2012	In-house 內部員工	Ms Kristen Suen 2625 6334
80/10/18	Ageas Insurance Company (Asia) Ltd (former:Fortis Insurance Company (Asia) Limited)	Management Enhancement Program II *	8	Jan 2012 – Dec 2012	In-house 內部員工	Ms Kristen Suen 2625 6334
80/10/21	Ageas Insurance Company (Asia) Ltd (former:Fortis Insurance Company (Asia) Limited)	IL-CPD-01 to 08*	20	Aug 2011 – Jul 2012	In-house 內部員工	Ms Kristen Suen 2625 6334

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80/10/22	Ageas Insurance Company (Asia) Limited	Basic Financial Planning 理財策劃基礎	6	Jan 2012 – Dec 2012	In-house + Commissioning Body	Ms Kristen Suen 2625 6334
80/10/23	Ageas Insurance Company (Asia) Limited	Fundamental Agency Management Course (營銷管理基礎課程)*	10	Jan 2012 – Dec 2012	In-house 內部員工	Ms Kristen Suen 2625 6334
80/11/09	Sun Life Hong Kong Ltd	Compliance Workshop*	5	May 2011- Apr 2012	In-house 內部員工	Ms Ester Ku 3107 3291
80/15/22	The Hongkong and Shanghai Banking Corporation Limited	Investment Licensing Training*	8	Jul 2011- Jun 2012	In-house 內部員工	Ms Serina Chan 2288 4198
80/15/47	The Hongkong and Shanghai Banking Corporation Limited	General Insurance Service	10	Jun 2011 – May 2012	In-house 內部員工	Ms Amy Law 2288 4148

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80/16/07	Zurich International Life Limited	Zurich Academy – Investment Learning Programme*	13	Jan 2012- Dec 2012	Others: Insurance Brokers, Independent Financial Advisors	Mr Glen Chow 3405 7132
80/17/15 Renewed	Manulife (International) Ltd	Financial Planning Development Program (FPDP): Module 4 – Comprehensive Financial Planning	10	Apr 2012- Mar 2013	In-house 內部員工	Mr Affa Ho 2919 3425
80/17/16	Manulife (International) Ltd	Financial Planning Development Program – Module 2*	12	Aug 2011- Jul 2012	In-house 內部員工	Mr Affa Ho 2919 3425
80/18/03	Cosmos Asia Consultants Limited	Insurance and Law*	16	Jun 2011 – May 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Nick Wong/ Mr Albert Tang 2524 8996

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80/20/04	Convoy Financial Services Limited	Recruitment Startup Workshop	3	Jun 2011 – May 2012	In-house 內部員工	Ms Isabel Kwan 3601 3849
80/20/06	Convoy Financial Services Limited	MPF Updates	2	May 2011 – Apr 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Isabel, Kwan Yuen Han 3601 3849
80/20/07	Convoy Financial Services Limited	強積金中介人考試精讀班	6	Sep 2011 – Aug 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Keith Hin 3601 3643
80/20/08	Convoy Financial Services Limited	強積金中介人僱員自選安排培訓 (ECA Training for MPF Intermediaries)	2	Sep 2011 – Aug 2012	In-house + Commissioning Body	Mr Keith Hin 3601 3643
80/23/09	Sun Life Hong Kong Limited	New Managers Development Program*	23	Jan 2012 – Dec 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Ester Ku 3107 3291

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80/23/16	Sun Life Hong Kong Limited	IL-CPD-01 to 08: The Enhanced Investment-linked Long Term Insurance Continue Professional Development Training Course (IL CPD)*	20	Jan 2012 – Mar 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Ester Ku 3107 3291
		Investment Series: Module 01 to 08 *		Apr 2012 - Dec 2012		
80/23/17	Sun Life Hong Kong Limited	The Sales Suitability Workshop *	16	May 2011 – Apr 2012	In-house 內部員工	Ms Ester Ku 3107 3291
80/23/18	Sun Life Hong Kong Limited	ECA Training for MPF Intermediaries	2	Aug 2011 – Jul 2012	In-house 內部員工 (Including channel partners such as Bank Sellers, Brokers and Agents)	Ms Ester Ku 3107 3291
80/23/19	Sun Life Hong Kong Limited	Enhancing Financial Capabilities Program 財策技能進階課程*	15	Jan 2012 – Dec 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Ester Ku 3107 329

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80/24/32	Management and Executive Development Centre, The Hong Kong Polytechnic University	IL-CPD-01 to 08: Enhanced Investment-linked Long Term Insurance (IL) CPD Training*	20	Jul 2011 – Jun 2012	Public 公眾人士	Ms Jeanne Ng 3400 2770
80/24/33	Management and Executive Development Centre, The Hong Kong Polytechnic University	MPF 10th Anniversary Review and Advanced Investment Analysis*	10	May 2011 – Apr 2012	Public 公眾人士	Miss Jeanne Ng 3400 2770
80/24/34	Management and Executive Development Centre, The Hong Kong Polytechnic University	ECA Training for MPF Intermediaries	2	Sep 2011 – Aug 2012	Public 公眾人士	Miss Jeanne Ng 3400 2770
80/24/35 New	Management and Executive Development Centre, The Hong Kong Polytechnic University	Power Sales on Financial Products for Financial Practitioners*	8	Mar 2012 – Feb 2013	Public 公眾人士	Miss Jeanne Ng 3400 2770
80/25/07	ACE Life Insurance Company Ltd (Former: New York Life Insurance Worldwide Ltd)	Financial Planning Series*	6	Jun 2011 – May 2012	In-house 內部員工	Mr Raymond Wong 2837 7144

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80/25/11	ACE Life Insurance Company Ltd (Former: New York Life Insurance Worldwide Ltd)	Financial Planning Strategies*	5	Jul 2011- Jun 2012	In-house 內部員工	Mr Raymond Wong 2837 7144
80/25/18	ACE Life Insurance Company Ltd (Former: New York Life Insurance Worldwide Ltd)	Financial Need Analysis Workshop	12	Jul 2011 – Jun 2012	In-house 內部員工	Mr Raymond Wong 2837 7144
80/25/21	ACE Life Insurance Company Ltd (Former: New York Life Insurance Worldwide Ltd)	IL-CPD-01 to 08: IL-CPD*	20	Sep 2011 – Aug 2012	In-house 內部員工	Mr Alex Chan 2837 7030
80/25/22	ACE Life Insurance Company Ltd (Former: New York Life Insurance Worldwide Ltd)	Selling Techniques Workshop - CPD*	40	Nov 2011- Oct 2012	In-house 內部員工	Mr Alex Chan 2837 7030
80/25/23	ACE Life Insurance Company Ltd (Former: New York Life Insurance Worldwide Ltd)	Investment Knowledge and Application*	15	Apr 2012– Mar 2013	In-house 內部員工	Mr Raymond Wong 2837 7144
80/29/02	AXA China Region Insurance Co. Ltd	QEP5: Investment-Linked Long Term Exam Preparatory Class	12	Jul 2011 – Jun 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Edmond Tse 3586 3221

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80/29/14	AXA China Region Insurance Co. Ltd	Target Marketing Workshop	3.5	Jan 2012- Dec 2012	In-house 內部員工	Ms Judy Ng 3586 3206
80/31/02	Prudential Assurance Company Ltd	Insurance Intermediaries Related Regulatory Compliance	10	Jul 2011 – Jun 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Allan Lau 3181 1805
80/31/17	Prudential Assurance Company Ltd	Retirement Planning 退休策劃*	6	May 2011 – Apr 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Allan Lau 2313 3041
80/31/18	Prudential Assurance Company Ltd	Health Risk Management 健康風險管理*	6	May 2011 – Apr 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Allan Lau 2313 3041
80/31/19	Prudential Assurance Company Ltd	Financial Planning Series I*	8	May 2011 – Apr 2012	In-house 內部員工	Ms Jenny Chan 3181 1843
80/31/20	Prudential Assurance Company Ltd	Agency Management Training Program (Series I)*	40	May 2011 – Apr 2012	In-house 內部員工	Ms Michele Chan 3181 1846

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80/31/21	Prudential Assurance Company Ltd	Agency Management Training Program (Series II) *	36	Jul 2011 – Jun 2012	In-house 內部員工	Ms Michele Chan 3181 1846
80/31/22	Prudential Assurance Company Ltd	Agency Management Training Program (Series III) *	39	Jul 2011 – Jun 2012	In-house 內部員工	Ms Michele Chan 3181 1846
80/31/23	Prudential Assurance Company Ltd	Rookies Start 理財顧問基礎課程*	39	Aug 2011 – Jul 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Anson Lu 3181 1837
80/31/24	Prudential Assurance Company Ltd	Industry Elite Quick Start Programme 同業精英快速啟動課程 *	6	Aug 2011 – Jul 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Anson Lu 3181 1837
80/31/25	Prudential Assurance Company Ltd	Code of Conduct for Financial Consultant 理財顧問專業守則	2	Sep 2011 – Aug 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Anson Lu 3181 1837
80/31/26	Prudential Assurance Company Ltd	Financial Planning Development Program*	33	Feb 2012 – Jan 2013	In-house 內部員工	Ms Joy Lee 3181 1853

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80/31/27 New	The Prudential Assurance Company Limited	Be a Courageous and Influential Sales Leader*	10.5	Mar 2012 – Feb 2013	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Beatrice Lai 2977 3748
80/33/12	Aon Hong Kong Limited	Errors & Omissions (E & O)	2	Feb 2012 – Jan 2013	In-house 內部員工	Ms Pauline Ching 2862 4149
80/33/17	Aon Hong Kong Limited	Basic Insurance Principles & Practices for Insurance Intermediaries*	4	Apr 2011- Mar 2012	In-house 內部員工	Ms Angie Yu 2861 6403
80/33/18	Aon Hong Kong Limited	Foundation Program for Agents and Brokers*	28	Apr 2011 - Mar 2012	In-house 內部員工	Ms Angie Yu 2861 6403
80/33/24	Aon Hong Kong Limited	Proposal Writing and Presentation Preparation for Insurance Agents and Brokers	3	Apr 2011– Mar 2012	In-house 內部員工	Ms Angie Yu 2861 6403

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80/33/28	Aon Hong Kong Limited	5P + 5R: 從心改變 – 成為成功的保險從業員 (Five Principles and Five Work Rules (5P + 5R) for Successful Insurance Brokers and Agents) *	12	Jun 2011 – May 2012	In-house 內部員工	Ms Angie Yu 2861 6403
80/33/29	Aon Hong Kong Limited	Data Protection – Exposures & Solutions	2	July 2011 – Jun 2012	In-house 內部員工	Ms Angie Yu 2861 6403
80/33/30	Aon Hong Kong Limited	Employee Benefits Program*	8	Aug 2011 – Jul 2012	In-house 內部員工	Ms Angie Yu 2861 6403
80/33/31	Aon Hong Kong Limited	Business Development Series – Challenges and Opportunities in the Printing Industry for Brokers and Agents	2	Sep 2011 – Aug 2012	In-house 內部員工	Ms Angie Yu 2861 6403
80/33/32 New	Aon Hong Kong Limited	Industry Talk: Cyber Risk - The Risk No Business Can Ignore	2	Mar 2012 – Feb 2013	In-house	Ms Pauline Ching 2862 4149
80/37/02	Standard Academy of Insurance & Management Ltd	Employee Compensation Ordinance	5	Sep 2011– Aug 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chow 2523 6350

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80/37/03	Standard Academy of Insurance & Management Ltd	Abstracts of Insurance Related Ordinances - Brief Summary	5	Sep 2011– Aug 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chow 2523 6350
80/37/04	Standard Academy of Insurance & Management Ltd	28 Insurance Traps an insurance intermediary has to know*	5	Aug 2011 – Jul 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr 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	Aug 2011 – Jul 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chow 2523 6350

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80/37/06	Standard Academy of Insurance & Management Ltd.	Sale Made Simple - Popular Insurance Series No.1*	10	Nov 2011 – Oct 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chow 2523 6350
80/37/07	Standard Academy of Insurance & Management Ltd	Sale Made Easy Series*	15	Dec 2011– Nov 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chow 2523 6350
80/37/08	Standard Academy of Insurance & Management Ltd	Management Series No. 2*	20	Aug 2011 – Jul 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chow 2523 6350

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80/37/09	Standard Academy of Insurance & Management Ltd	Career and Job Management Series*	15	Feb 2012 – Jan 2013	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chow 2523 6350
80/37/10	Standard Academy of Insurance & Management Ltd	MPF 2011 – Practical Knowledge for selling and advising MPD products plus other highlights (2CPD) and Motor Insurance (3CPD)	5	May 2011 - Apr 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chow 2523 6350
80/37/11 Renewed	Standard Academy of Insurance & Management Ltd	32 Actual Insurance Claims Complaint an Insurance Intermediary cannot Miss or Ignore	5	May 2012 – Apr 2013	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chow 2523 6350

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80/37/12 Renewed	Standard Academy of Insurance & Management Ltd	Business Interruption Insurance, Fidelity Guarantee and Surety Bond	5	May 2012 – Apr 2013	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chow 2523 6350
80/37/13	Standard Academy of Insurance & Management Ltd	By NLP Skills to improve sales performance and communication	5	Jan 2012– Dec 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chow 2523 6350
80/37/14 Renewed	Standard Academy of Insurance & Management Ltd	Corporate and Personal Branding Management in Insurance Industry	5	May 2012 – Apr 2013	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chow 2523 6350

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80/37/16	Standard Academy of Insurance & Management Ltd	80 insurance clauses and warranties an insurance intermediary has to understand	5	Oct 2011 – Sep 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chow 2523 6350
80/37/17	Standard Academy of Insurance & Management Ltd	Staff and career counselling for employees' assistance, guidance, communication and motivation	5	Oct 2011 – Sep 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chow 2523 6350
80/37/18	Standard Academy of Insurance & Management Ltd	Risk Management	5	Mar 2012 – Feb 2013	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chow 2523 6350

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80/37/19	Standard Academy of Insurance & Management Ltd	Top Twenty Management Models (Conceptual Tools) - Most Effective and Useful Shortcut Guild for Successful Managers	5	Sep 2011– Aug 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chow 2523 6350
80/37/20	Standard Academy of Insurance & Management Ltd	Effective Time Management for Insurance Intermediaries	5	Sep 2011– Aug 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chow 2523 6350
80/37/21	Standard Academy of Insurance & Management Ltd	IL-CPD-01 to 08: Enhanced Investment- Linked Long Term Insurance CPD*	20	Jun 2011 – May 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chow 2523 6350

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80/37/22	Standard Academy of Insurance & Management Ltd	Historical Evolution of Management Thoughts– Twelve Evergreen Greatest Management Thoughts with Application in Insurance	5	Sep 2011– Aug 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr 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	Aug 2011 – Jul 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chow 2523 6350
80/37/24	Standard Academy of Insurance & Management Ltd	Enhancing Self- confidence and Self- esteem to improve sales performance	5	Feb 2012 – Jan 2013	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chow 2523 6350

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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	Aug 2011 – Jul 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chow 2523 6350
80/37/26	Standard Academy of Insurance & Management Ltd	Career Self-Management	5	Sep 2011 – Aug 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chow 2523 6350
80/37/27	Standard Academy of Insurance & Management Ltd	Effective Leadership	5	Apr 2012 – Mar 2013	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Raymond Chow 2523 6350
80/38/02	The Insurance Institute of Hong Kong	"Legal Series" Seminar for Insurance Intermediaries*	40	Oct 2011- Sep 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Tania Lee 2520 0098

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80/38/11	The Insurance Institute of Hong Kong	“Risks and Underwriting Series” Seminar *	22	Feb 2012 – Jan 2013	Public 公眾人士	Ms Tania Lee 2520 0098
80/38/12	The Insurance Institute of Hong Kong	Business Interruption*	12	Sep 2011 – Aug 2012	Public 公眾人士	Ms Tania Lee 2520 0098
80/38/14	The Insurance Institute of Hong Kong	Face-to-face Insurance Learning - Energy and Marine Series*	12	Feb 2012 – Jan 2013	Public 公眾人士	Ms Tania Lee 2520 0098
80/40/04	Hong Kong Life Insurance Ltd	Life Stages - Effective Insurance Selling Skills Workshop	3	Aug 2011 – Jul 2012	In-house 內部員工	Mr Victor Lee 2290 2819
80/40/05	Hong Kong Life Insurance Ltd	Enhancing Insurance Selling Skills Series*	6	Aug 2011 – Jul 2012	In-house 內部員工	Mr Victor Lee 2290 2819
80/40/06	Hong Kong Life Insurance Ltd	Life Operations- Underwriting & Policy Administration*	6	Sep 2011- Aug 2012	In-house 內部員工	Mr Victor Lee 2290 2819

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80/40/10	Hong Kong Life Insurance Ltd	'I Can Sell, You Can Sell' Selling Made Easy	3	Aug 2011 – Jul 2012	In-house 內部員工	Mr Victor Lee 2290 2819
80/41/11 New	Institute of Professional Education and Knowledge (PEAK) of the VTC & General Agents and Managers Association (GAMAHK)	CPD Seminar 2012	10	Apr 2012 – Mar 2013	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Polly Tam 2836 1822
80/45/02	The Hong Kong Federation of Trade Unions	Module Certificate in the Most Recently Enacted Laws Related to Insurance 最新保險相關法例單元證書	10	Feb 2012– Jan 2013	Public 公眾人士	Ms Wong Chi Mei 2715 6671
80/45/03	The Hong Kong Federation of Trade Unions	Module Certificate in Code of Conduct for Insurers and Code of Practice for Insurance Intermediaries 承保人及保險中介人實務守則單元證書	10	Feb 2012– Jan 2013	Public 公眾人士	Ms Wong Chi Mei 2715 6671

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80/45/04	The Hong Kong Federation of Trade Unions	Module Certificate in Statutory Insurance (Employees' Compensation) 強制性保險條例(僱員補償)單元證書	10	Feb 2012– Jan 2013	Public 公眾人士	Ms Wong Chi Mei 2715 6671
80/45/06	The Hong Kong Federation of Trade Unions	Module Certificate in Life Insurance and Related Legal Provisions 人壽保險相關法例單元證書	10	May 2011 – Apr 2012	Public 公眾人士	Ms Wong Chi Mei 2715 6671
80/45/07	The Hong Kong Federation of Trade Unions	Module Certificate in Commercial Insurance and Related Legal Provisions 商業保險相關法例單元證書	10	May 2011 – Apr 2012	Public 公眾人士	Ms Wong Chi Mei 2715 6671
80/45/08	The Hong Kong Federation of Trade Unions	Module Certificate in Statutory Insurance (Motor) 強制性保險條例(汽車)單元證書	10	May 2011 – Apr 2012	Public 公眾人士	Ms Wong Chi Mei 2715 6671
80/45/09	The Hong Kong Federation of Trade Unions	Module Certificate in Insurance Claims (Medical & Personal Accidents) 保險索償(醫療及個人意外)單元證書	11	May 2011 – Apr 2012	Public 公眾人士	Ms Wong Chi Mei 2715 6671

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80/45/10	The Hong Kong Federation of Trade Unions	Module Certificate in China Insurance Laws (Elementary) 中國保險法(初階)單元證書	11	May 2011 – Apr 2012	Public 公眾人士	Ms Wong Chi Mei 2715 6671
80/45/13	The Hong Kong Federation of Trade Unions	Module Certificate in Effective Communication in Financial Counseling 財務諮詢有效溝通技巧 單元證書	11	May 2011 – Apr 2012	Public 公眾人士	Ms Wong Chi Mei 2715 6671
80/45/14	The Hong Kong Federation of Trade Unions	Module Certificate in Financial Planning (Basic Concept) 財務策劃(基本概念) 單元證書	14	May 2011 – Apr 2012	Public 公眾人士	Ms Wong Chi Mei 2715 6671
80/45/15	The Hong Kong Federation of Trade Unions	Module Certificate in Financial Planning (Investment Planning and Risk Management) 財務策劃(投資策劃及 風險管理)單元證書	14	May 2011 – Apr 2012	Public 公眾人士	Ms Wong Chi Mei 2715 6671
80/45/16	The Hong Kong Federation of Trade Unions	Module Certificate in Financial Planning (Mutual Funds and Equity) 財務策劃(基金和證券 投資)單元證書	10	May 2011 – Apr 2012	Public 公眾人士	Ms Wong Chi Mei 2715 6671

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80/45/17	The Hong Kong Federation of Trade Unions	Module Certificate in Financial Planning (Advanced Retirement Planning) 財務策劃(退休策劃進階)單元證書	10	Feb 2012– Jan 2013	Public 公眾人士	Ms Wong Chi Mei 2715 6671
80/45/18	The Hong Kong Federation of Trade Unions	IL-CPD-01 to 08:特定 20 小時專業培訓課程*	20	Oct 2011- Sep 2012	Public 公眾人士	Ms Wong Chi Mei 2715 6671
80/52/02	Royal Skandia Life Assurance Limited	Legal Aspects of Financial Planning in Hong Kong*	4	Nov 2011 – Oct 2012	Commissioning Body 委託機構員工 (Insurance brokers with terms of business with Royal Skandia Life Assurance Ltd)	Mr Craig So 3552 5888
80/52/03	Royal Skandia Life Assurance Limited	Essentials of Running a Financial Planning Practice*	9	Nov 2011 – Oct 2012	Commissioning Body 委託機構員工 (Insurance brokers with terms of business with Royal Skandia Life Assurance Ltd)	Mr Craig So 3552 5888
80/52/05	Royal Skandia Life Assurance Limited	UK Inheritance Tax Planning through Use of Trusts	2	Nov 2011 – Oct 2012	Commissioning Body 委託機構員工 (Insurance brokers with terms of business with Royal Skandia Life Assurance Ltd)	Mr Craig So 3552 5888

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80/52/06	Royal Skandia Life Assurance Limited	Dealing through Portfolio Bonds	1.5	Nov 2011 – Oct 2012	Commissioning Body 委託機構員工 (Insurance brokers with terms of business with Royal Skandia Life Assurance Ltd)	Mr Craig So 3552 5888
80/52/09	Royal Skandia Life Assurance Limited	Qualifying Recognised Overseas Pension Scheme (QROPS) - Implication to expatriate policyholders	1.5	Feb 2012 – Jan 2013	Commissioning Body 委託機構員工	Mr Craig So 3552 5888
80/52/10 New	Royal Skandia Life Assurance Limited	Insurance intermediaries training series - Communication skills*	12	May 2012 – Apr 2013	Commissioning Body 委託機構員工: insurance intermediaries with terms of business	Mr Craig So 3552 5888
80/59/04 Renewed	The Life Underwriters Association of Hong Kong Limited	Seminar on Finance & Legal Knowledge for Insurance Practitioners in Hong Kong*	6.5	Apr 2012- Mar 2013	In-house 內部員工	Ms Andy Mok 2969 0244
80/61/02	Citibank (Hong Kong) Limited	Investment Compliance Training	3	Jul 2011 – Jun 2012	In-house 內部員工	Ms Cindy Lai 2962 7785
80/61/03	Citibank (Hong Kong) Limited	Insurance Compliance Training	2	Nov 2011 – Oct 2012	In-house 內部員工	Ms Wendy Au 2962 3040

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80/61/07	Citibank (Hong Kong) Limited	Strengthen the relationship with our affluent customers through understanding of wine investment 透過紅酒投資知識跟高端客戶溝通	5	Feb 2012 – Jan 2013	In-house 內部員工	Ms Suky Chiu 2962 3536
80/61/08 New	Citibank (Hong Kong) Limited	Essential Insurance Selling Skills	5	Mar 2012 – Feb 2013	In-house 內部員工	Ms Kelly Lui 2962 3492
80/64/02	Time Technology Solutions Ltd	Enhancing your Performance through Effective Planning	7	Sep 2011 – Aug 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Phoebe Wong 3101 8555
80/67/09	Jardine Lloyd Thompson Limited	E & O Awareness Training *	7	May 2011 – Jun 2012	In-house 內部員工	Mr Nick Cousins 2864 5595
80/67/10	Jardine Lloyd Thompson Limited	Basic Insurance for Brokers *	6	Jun 2011 – May 2012	In-house 內部員工	Dr Wiktor Tutlewski 2864 5371
80/67/11 New	Jardine Lloyd Thompson Limited	Winning Performance	3	Mar 2012 – Feb 2013	In-house 內部員工	Ms Anne Chan 2864 5318
80/68/12	Friends Provident International Limited	Essential Law and Tax for the Financial Advisers*	9	Nov 2011 - Oct 2012	Commissioning Body [Independent Financial Advisor (IFA) Companies]	Ms Sindy Chow 2918 7017

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80/68/13	Friends Provident International Limited	Retirement	2.5	Aug 2011 – Sep 2012	Others (Independent Financial Adviser (IFA) companies	Ms Sindy Chow 2918 7017
80/68/14	Friends Provident International Limited	Practical Uses of Trusts	1	Sep 2011 – Aug 2012	Others (Independent Financial Adviser (IFA) companies	Ms Sindy Chow 2918 7017
80/68/15	Friends Provident International Limited	UK Proposals for Statutory Residence Test	1	Sep 2011 – Aug 2012	Others (Independent Financial Adviser (IFA) companies	Ms Sindy Chow 2918 7017
80/74/05	Hong Kong Institute of Bankers	Investment Services and Risk Management Program*	20	Jun 2011 – May 2012	Public 公眾人士	Ms Karen Yung 2153 7899
80/74/06	Hong Kong Institute of Bankers	Financial Planning Foundation Program*	40	Aug 2011- Jul 2012	In-house 內部員工 + Public 公眾人士	Ms Karen Yung 2153 7899
80/74/13	Hong Kong Institute of Bankers	金融產品中介人銷售合 規	3	Jan 2012 – Dec 2012	Public 公眾人士	Ms Karen Yung 2153 7899

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80/74/14	Hong Kong Institute of Bankers	Risk Management and Investment Services for Corporate Client*	15	Mar 2012 – Feb 2013	Public 公眾人士	Ms Karen Yung 2153 7899
80/74/15	Hong Kong Institute of Bankers	Enhanced Investment-linked Long Term Insurance – CPD Programme (IL-CPD-01 to 08)*	20	Aug 2011 – Jul 2012	Public 公眾人士	Ms Karen Yung 2153 7899
80/74/16	Hong Kong Institute of Bankers	金融產品銷售合規及實務處理*	8	Mar 2012 – Feb 2013	Public 公眾人士	Ms Karen Yung 2153 7899
80/74/17	Hong Kong Institute of Bankers	財富管理課程之中國客戶服務 Wealth Management for Affluent Mainland Clients Program*	10	Mar 2012 – Feb 2013	Public 公眾人士	Ms Karen Yung 2153 7899
80/74/18	Hong Kong Institute of Bankers	Banking Services & Relationship Management for Corporate Client*	8	May 2011 – Apr 2012	Public 公眾人士	Ms Karen Yung 2153 7899
80/74/19	Hong Kong Institute of Bankers	Strive for Services Excellence*	12	Sep 2011 – Aug 2012	Public 公眾人士	Ms Karen Yung 2153 7899

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80/74/20	Hong Kong Institute of Bankers	中國經濟及金融業務課程 Mainland Business Environment Program*	13	Nov 2011 – Oct 2012	Public 公眾人士	Ms Karen Yung 2153 7899
80/78/08	Hong Kong Financial Services Professionals Association	Wealth Management and Financial Planning *	24	Aug 2011 – Jul 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Ricky Lee 2151 2618
80/92/02	The Institute of Financial Planners of Hong Kong Ltd	Practices & Updates in Financial Planning I *	40	Jul 2011- Jun 2012	Public 公眾人士	Ms Rita Kong 2982 7861
80/92/03	The Institute of Financial Planners of Hong Kong Ltd	Practices & Updates in Financial Planning II*	40	Apr 2012 – Mar 2013	In-house 內部員工 + Public 公眾人士	Ms Rita Kong 2982 7861

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80/92/04	The Institute of Financial Planners of Hong Kong Ltd	Practices & Updates in Financial Planning III - Investment and Risk Management Series*	40	Feb 2012 – Jan 2013	Public 公眾人士	Ms Rita Kong 2982 7861
80/92/05 Renewed	The Institute of Financial Planners of Hong Kong Ltd	Practices and Updates in Financial Planning IV *	27	Feb 2012 – Jan 2013	Public 公眾人士	Ms Rita Kong 2982 7861
80/92/06	The Institute of Financial Planners of Hong Kong Ltd	Practices and Updates in Financial Planning V*	48	May 2011 – Apr 2012	Public 公眾人士	Ms Rita Kong 2982 7861
80/92/07	The Institute of Financial Planners of Hong Kong Ltd	Practices and Updates in Financial Planning VI*	31	Sep 2011 - Aug 2012	Public 公眾人士	Ms Rita Kong 2982 7861
80/92/08	The Institute of Financial Planners of Hong Kong Ltd	Practices and Updates in Financial Planning VII*	22	Nov 2011 – Oct 2012	Public 公眾人士	Ms Rita Kong 2982 7861
80/95/03	AMTD Financial Planning Ltd	Fundamentals in Financial Planning	16	Sep 2011- Aug 2012	In-house 內部員工 + Public 公眾人士	Ms Wendy Chan 3161 3659

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80/101/03	Sun Hung Kai Financial Limited	Insurance Sales Workshop*	5	Jul 2011 – Jun 2012	In-house 內部員工	Mr Pharaoh Yam 3920 1980

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80/101/04	Sun Hung Kai Financial Limited	Business Integrity and Compliance Update for Financial Practitioners; Prevention of Money Laundering & Terrorist Financing*	2	Oct 2011- Sep 2012	In-house 內部員工	Mr Keane Leung 3920 2430
80/101/06	Sun Hung Kai Financial Limited	Essential Skills for Financial Practitioners (I)*	8	Jan 2012 – Dec 2012	In-house 內部員工	Ms Angela Wu 3920 2962
80/101/07	Sun Hung Kai Financial Limited	Essential Skills for Financial Practitioners (II)*	8	Jan 2012 – Dec 2012	In-house 內部員工	Ms Angela Wu 3920 2962
80/101/08	Sun Hung Kai Financial Limited	Essential Skills for Financial Practitioners (III)*	8	Jul 2011 – Jun 2012	In-house 內部員工	Ms Elaine Kwok 3920 2962
80/104/03	Kornerstone Limited	Essential Skills for Wealth Manager*	7.5	Jun 2011 – May 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Kenneth Chan 2116 3328
80/104/04 New	Kornerstone Limited	Industries CPD Series: Understanding Risk Concerns of Different Industries	8	Mar 2012 – Feb 2013	Public 公眾人士 + Commissioning Body 委託機構員工	Mr Kenneth Chan 2116 3328

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80/105/02	Professional School of Enneagram Limited	Understanding Your customers through Enneagram*	8	Nov 2011 – Oct 2012	Public 公眾人士	Ms Kattie Kwok 2116 1581
80/105/03	Professional School of Enneagram Limited	Objection Handling Made Easy Through Enneagram*	8	Nov 2011 – Oct 2012	Public 公眾人士	Ms Kattie Kwok 2116 1581
80/106/03	AEGON Direct Marketing Services Hong Kong Limited	Smart Selling	14	Nov 2010 – Oct 2011	In-house 內部員工	Mr Santos Leung 3655 8236
80/107/02	Institute for English and Communications Limited	Investing Psychology: A Practical Hands On Workshop*	12	Apr 2011 – May 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Jennifer Bovard 2540 6959
80/109/02	MetLife Limited	保險法規，知多少*	10	Oct 2011- Sep 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Terry Wu 2199 1830

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80/109/03	MetLife Limited	Financial Planning Basics and Application*	23.5	May 2011 – Apr 2012	Employees of business Partners	Mr Terry Wu 2199 1830
80/112/04	Bank of China Group Life Assurance Company Limited	高階銷售技巧工作坊 (Advanced Selling Skill Workshop)*	16	Sep 2011 – Aug 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Ivan Leung 2860 0356
80/113/03 Renewed	CITIC Bank Internatio Ltd	Sales Application Workshop*	14	Mar 2012 – Feb 2013	In-house 內部員工	Ms Stella Lam 3603 2533
80/118/02	P.C. Image Consulting	Professional Image and Business Etiquette for Financial Planning Business 理財策劃行業的專業形 象及商務禮儀*	8	Jun 2011 – May 2012	Public 公眾人士	Mr Thomas Koon 2739 9683

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80/119/05	Generali International Limtied	Market Insights *	14	Jun 2011 – May 2012	In-house 內部員工 + Commissioning Body 委託機構員工 (Insurance Brokers, Independent Financial Advisers)	Ms Jennifer Chan/ Ms Flora Chan 2531 8952/ 2531 8957
80/121/02	Infinite Intelligence	如何處理你的強積金戶 口及與遺產承辦的安排*	9	Apr 2012- Mar 2013	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Alice Lam 6349 6788
80/121/04	Infinite Intelligence	Business Insurance*	7	May 2011 – Apr 2012	Public 公眾人士	Ms Alice Lam 6349 6788
80/122/08	AIA Pension and Trustee Co. Ltd	ECA Training for MPF Intermediaries	2	Sep 2011 – Aug 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Irene Shek 2100 1943

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80/122/09	AIA Pension and Trustee Co. Ltd	Sales Cycle Series Course*	10	Oct 2011 – Sep 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Irene Shek 2100 1943
80/122/10	AIA Pension and Trustee Co. Ltd	MPF Training Series*	32	Feb 2012 – Jan 2013	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Irene Shek 2100 1943

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80/123/02	Franklin Templeton Investments (Asia) Ltd	Financial Planning Training Series (理財策劃培訓工作坊)*	16	May 2011 – Apr 2012	Business Partners – Frontline Staff of banks, Employees/ Partners of insurance companies and Independent Financial Advisors (“IFA”)	Mr Joseph Wong 2829 0662
80/124/02	Keen Eagle Financial Services Ltd	Hong Kong Financial Market Regulatory Framework & Update*	15	May 2011- Apr 2012	Commissioning Body 委託機構員工	Mr Teddy Luk 2815 3218
80/125/02	Hong Kong Confederation of Trade Unions	保險索償(醫療及個人 意外)單元證書課程	11	Sep 2011 – Aug 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Jenny Wong 3758 5435
80/125/03	Hong Kong Confederation of Trade Unions	財務策劃(遺產繼承與 承辦)單元證書課程	10	Sep 2011 – Aug 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Jenny Wong 3758 5435
80/125/04	Hong Kong Confederation of Trade Unions	財務策劃(退休策劃進 階)單元證書課程	10	Sep 2011 – Aug 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Jenny Wong 3758 5435

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80/125/05	Hong Kong Confederation of Trade Unions	財務策劃(保險原理及 風險管理進階)單元證 書課程	10	Sep 2011 – Aug 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Jenny Wong 3758 5435
80/125/06	Hong Kong Confederation of Trade Unions	強制性保險條例(僱員 補償)單元證書課程	10	Sep 2011 – Aug 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Jenny Wong 3758 5435
80/125/07	Hong Kong Confederation of Trade Unions	財務諮詢(有效溝通技 巧)單元證書課程	11	Sep 2011 – Aug 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Jenny Wong 3758 5435
80/125/08	Hong Kong Confederation of Trade Unions	財務策劃(基本概念)單 元證書課程	14	Sep 2011 – Aug 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Jenny Wong 3758 5435
80/125/09	Hong Kong Confederation of Trade Unions	商業保險相關法例單元 證書課程	10	Jul 2011 – Jun 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Jenny Wong 3758 5435

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80/125/10	Hong Kong Confederation of Trade Unions	財務策劃(退休策劃初 階)單元證書課程	14	Sep 2011 – Aug 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Jenny Wong 3758 5435
80/125/11	Hong Kong Confederation of Trade Unions	中國保險法(初階)單元 證書課程	11	Sep 2011 – Aug 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Jenny Wong 3758 5435
80/125/12	Hong Kong Confederation of Trade Unions	財務策劃(投資策劃及 風險管理)單元證書課 程	14	Sep 2011 – Aug 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Jenny Wong 3758 5435
80/125/13	Hong Kong Confederation of Trade Unions	財務策劃(基金及證券 投資)單元證書課程	10	Sep 2011 – Aug 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Jenny Wong 3758 5435
80/125/14	Hong Kong Confederation of Trade Unions	最新保險相關法例單元 證書課程	10	Sep 2011 – Aug 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Jenny Wong 3758 5435

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80/125/15	Hong Kong Confederation of Trade Unions	人壽保險相關法例單元 證書課程	10	Sep 2011 – Aug 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Jenny Wong 3758 5435
80/125/17	Hong Kong Confederation of Trade Unions	承保人及保險中介人實 務守則單元證書課程	10	Sep 2011 – Aug 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Jenny Wong 3758 5435
80/126/03	The Bank of East Asia Ltd	Employee Choice Arrangement Training for MPF Intermediaries	2	Sep 2011 – Aug 2012	In-house 內部員工	Ms Eva Wong 3608 4874
80/129/02	Altruist Concepts Limited	LIMRA Compliance and Market Conduct Curriculum for Insurance Intermediaries LIMRA 保險中介人合 規與市場行為課程*	8	Jul 2011 – Jun 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Ms Rebecca Lui 2834 4321
80/130/02	WILL in Action Ltd & HKU - Centre on Behavioral Health (CBH)	Will In Action - Professional Life & Death Education Course 生前計劃 - 專業生死教 育課程	3	Sep 2011 – Aug 2012	Public 公眾人士 + Commissioning Body 委託機構員工	Ms Shadow Cheung 3595 2033

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80/131/02	BMI Professional Training Centre Limited	IL-CPD 01-08: An enhanced version of Investment-linked long term insurance CPD*	20	Nov 2011 – Oct 2012	Public 公眾人士 + In-house 內部員工	Ms Maggie Cheung 3970 9236
80/132/02	Centaline Financial Services Ltd	Portfolio Management in Financial Planning Series*	10	Oct 2011- Sep 2012	In-house 內部員工 + Public 公眾人士	Ms Moraine Chow 2106 3320
80/135/02	Principal Insurance Company (HK) Ltd	Companion with Your Clients for Better Retirement Life *	6	May 2011 – Apr 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Stanley Ng 2263 0229
80/136/02	Last Word Media (Asia) Pte Ltd	HK Expert Investor Forum	4	May 2011 – Apr 2012	Public 公眾人士	Mr Michael Li 2273 5982
80/136/03	Last Word Media (Asia) Pte Ltd	International Adviser QROPS Forum Hong Kong	4	Nov 2011 – Oct 2012	Public 公眾人士	Mr Michael Li 3796 2551
80/137/02	IPP Wealth Advisers Ltd	CPD Courses for Financial Advisers*	12	May 2011 – Apr 2012	In-house 內部員工	Mr Li Wing Yiu 3713 7137
80/138/02	China Life Insurance (Overseas) Co. Ltd.	Agent Sales Training Series*	10	May 2011 – Apr 2012	In-house 內部員工	Ms Queenie Wong 2831 5625

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80/138/04	China Life Insurance (Overseas) Co. Ltd	ECA Training for MPF Intermediaries (強積金 中介人僱員自選安排培 訓)	2	Dec 2011 – Nov 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Michelle Chan 2831 5629
80/139/02	Ever United Advisers Ltd.	IL-CPD-01 to 08 Series*	20	Nov 2011– Oct 2012	In-house 內部員工 + Public 公眾人士	Ms Maggie Cheung 3970 9236
80/143/02	BCT Financial Ltd	ECA Training for MPF Intermediaries	2	Oct 2011 – Sep 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Monica Ng 2298 9232

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80/138/03	China Life Insurance (Overseas) Co. Ltd.	Financial Planning Series *	9	Jul 2011 – Jun 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Decem Wong 2831 7973
80/139/02	Ever United Advisers Ltd.	IL-CPD-01 to 08 Series*	20	Jun 2011 – May 2012	In-house 內部員工 + Commissioning Body 委託機構員工	Ms Carna Lee 2116 8938
80/139/03 New	Ever United Advisers Ltd.	Financial Risk Management and Investment Analysis & Strategy*	15	Apr 2012 – Mar 2013	In-house 內部員工 + Commissioning Body 委託機構員工	Mr Lee Ho Man 2877 9956
80/140/02	SGS Hong Kong Limited	NLP on Selling and Presentation	6	Jul 2011 – Jun 2012	Public 公眾人士	Mr Edmond Fung 2204 8323
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*	15	Jul 2011 – Jun 2012	In-house 內部員工 + Public 公眾人士 + Commissioning Body 委託機構員工	Mr Joe Yip 8100 8801

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80/142/02	Evolution-U Ltd	NLP Communication, Persuasion and Influence Techniques	12	Oct 2011 – Sep 2012	Public 公眾人士	Ms Jessica Chow 2201 4548
80/144/02	International Association of Registered Financial Cousultants	Professional Certificate in Financial Consulting (Executive Program) 資深財務策劃顧問專業 證書課程	14	Oct 2011 – Sep 2012	Public	Mr Allan Wan 3152 2314
80/145/02	Hong Kong Tak Ming College	金融風險管理系列*	8	Nov 2011 – Oct 2012	Public 公眾人士	Ms Natalie Leung 3153 2105
80/147/02	Institute of Professional Upgradation Company Limited	Trustworthy and Effective Financial Planning Skills*	15	Mar 2012 – Feb 2013	Commissioning Body 委託機構員工	Mr Eric Tai 3105 1813
80/147/03	Institute of Professional Upgradation Company Limited	Enhancing Execution and Relationship Effectiveness *	15	Mar 2012 – Feb 2013	Commissioning Body 委託機構員工	Mr Eric Tai 3105 1813

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IA/03/04 Renewed	Independent Commission Against Corruption	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 2012 – Mar 2013	Public (upon request by individual companies or professional bodies of insurance related industry only) 公眾人士 (須由與保 險業有關的個別公司 或團體提出要求)	Ms Esther Poon 2899 3793
IA/03/05 Renewed	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 2012 – Mar 2013	Public (upon request by individual companies or professional bodies of insurance related industry only) 公眾人士 (須由與保 險業有關的個別公司 或團體提出要求)	Ms Esther Poon 2899 3793
IA/03/06 Renewed	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 2012 – Mar 2013	Public (upon request by individual companies or professional bodies of insurance related industry only) 公眾人士 (須由與保 險業有關的個別公司 或團體提出要求)	Ms Esther Poon 2899 3793

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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 2011 – Oct 2012	Public (upon request by individual companies or professional bodies of insurance related industry only) 公眾人士 (須由與保 險業有關的個別公司 或團體提出要求)	Ms Esther Poon 2899 3793
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 2011 – Oct 2012	Public (upon request by individual companies or professional bodies of insurance related industry only) 公眾人士 (須由與保 險業有關的個別公司 或團體提出要求)	Ms Esther Poon 2899 3793
IA/05/01	Equal Opportunities Commission	Equal Opportunities and the Insurance Industry 平 等機會與保險業	3	Jul 2011 – Jun 2012	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 Florence Chan 2106 2151

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/08/02 Renewed	Office of the Privacy Commissioner for Personal Data, Hong Kong	Data Protection and Data Access Request	3	Apr 2012 – Mar 2013	Insurance Practitioners 保險從業員	Ms Penny Chan 2877 7152
IA/08/03 Renewed	Office of the Privacy Commissioner for Personal Data, Hong Kong	Data Protection in Human Resource Management	3	Apr 2012 – Mar 2013	Insurance Practitioners 保險從業員	Ms Penny Chan 2877 7152
IA/08/04 Renewed	Office of the Privacy Commissioner for Personal Data, Hong Kong	Data Protection in Direct Marketing Activities	3	Apr 2012 – Mar 2013	Insurance Practitioners 保險從業員	Ms Penny Chan 2877 7152
IA/08/05	Office of the Privacy Commissioner for Personal Data, Hong Kong	Data Protection in Insurance	3	Feb 2012 – Jan 2013	Insurance Practitioners 保險從業員	Ms Penny Chan 2877 7152