

高峰進修學院

Institute of Professional Education And Knowledge

PEAK

Member of VTC Group
VTC 機構成員

NOV14-JAN15

持續專業發展課程 及短期課程手冊

Continuing Professional
Development (CPD)
Programme and Short
Course Prospectus

Men's Forum: Finding The Right Woman
Anti-Money Laundering Course for Money
Service Operators- Customer Due
Diligence and Case Studies

Utilizing Customer Value Creation Strategy in Insurance Industry for Better Sales Performance
Practical Aspects of Occupational Safety and Employees' Compensation
Insurance Underwriting Advanced Management Skills for
Financial Professionals Lessons from the Financial
Disasters The Long Term Insurance
Market

Vision, Mission and Values 學院的願景、使命及信念

Vision 願景

To be a leading knowledge provider and qualifying body for organisational and professional development in the region.

在企業及個人專業發展的領域內，成為具備領導地位的知識傳授者和資格鑑定機構。

Mission 使命

To provide high quality and market driven education and training programmes, skills assessments, and consultancy services to meet the needs of adult learners and employers.

針對成年學員及僱主的需求，提供市場導向的優質教育與培訓課程、技能評核及顧問服務。

Values 信念

Customer Service	顧客至上
Innovation	意念創新
Quality	全面優質
Results	著重成果
Team Work	團隊協作

Message from the Principal 院長序言



Welcome to PEAK!

As one of the pioneering institutions in offering Continuing Professional Development (CPD) programmes, PEAK keeps on reviewing the training programmes with an aim to accommodate the diverse needs of financial practitioners. Apart from the CPD programmes, we continue to offer short courses to meet your personal enhancement needs. The following highlights our new CPD programmes and short courses for the coming quarter.

Working in the financial market, you have to face a lot of uncertainties and volatile situations every day. Good management skill is vital to endure in this competitive industry. PEAK offers a series of programmes "Advanced Management Skills for Financial Professionals" covering problem-solving, coaching, and time management, for the participants to further enhance the ability to overcome problems and to lead a successful team.

Apart from management skills training, PEAK also offers "Utilizing customer value creation strategy in insurance industry for better sales performance". This is designed for insurance and financial intermediaries for effective customer emphasised strategy which can be utilized in new business development and marketing management to achieve sales growth.

Workplace safety is becoming a growing concern in the community. In order to enhance corporate image and goodwill, companies are striving to achieve good safety performance. Company policy in providing insurance coverage to employees for accidents or occupational diseases arising out of and in the course of employment is a must, which is a big potential market for the insurance practitioners. The programme "Practical Aspects of Occupational Safety and Employees' Compensation Insurance Underwriting" will explore on how the knowledge of operational safety regulations can help negotiate for better terms when taking out the employees' compensation insurance.

I hope you will find our courses and programmes useful and relevant to your training needs. I look forward to welcoming you at PEAK.

Dr Lillian Wong
Principal, Institute of Professional Education And Knowledge
Vocational Training Council
Oct 2014

歡迎加入高峰進修學院 (PEAK) !

高峰進修學院 (PEAK) 作為提供持續專業發展 (CPD) 課程的領導機構之一，不斷檢討所提供的培訓課程，希望能切合各金融從業員不同的需求。除了 CPD 課程外，PEAK 會繼續提供短期課程，以迎合個人提升的需要。以下是來季最新 CPD 及短期培訓課程的概覽。

在金融市場工作，您需要每天面對很多不明確及不停變化的情況。在這個競爭激烈的行業立足，良好的管理技能是至為重要的。PEAK 推出了一系列有關管理技能的課程——「金融專業人士管理技能 (進階課程)」，涵蓋解決問題、指導、時間管理等內容，讓學員能夠提升解難的能力，帶領一個成功的團隊。

除了管理技能外，PEAK 另外亦提供了一個「應用客戶增值策略提升保險銷售業績」的課程，旨在讓保險及金融從業員掌握如何於新業務發展中運用客戶增值策略去取得銷售增長。

職業安全健康受到社會日益關注，企業為了爭取更好的商譽和品牌形象，都致力做到出色的安全表現。僱主必須為員工在意外事故或因工作引起的職業病提供保險的保障，這其實是一個有很大潛力的市場。有鑑於此，PEAK 最新的課程「職業安全行業應用及工傷風險承保實戰策略」將探討如何透過職業及勞工安全法規的知識，有助於購買僱員補償保險時爭取最佳的條件。

我們希望 PEAK 提供的課程能夠切合您的培訓需要，期待著在 PEAK 與您見面。

黃倩瑛博士
高峰進修學院院長
職業訓練局
2014年10月

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Institute Information 學院資料

Institute of Professional Education And Knowledge (PEAK) is a member of the VTC Group with over 20 years of experience in professional training and corporate human resources development. We are one of the leading in-service training organisations and qualifying bodies in Hong Kong. Our programmes cover the following areas: financial services, management, information technology, languages, construction, real estate & property management and aviation. In 2012/2013 alone, about 90,000 adult learners have enrolled in our programmes. In the area of corporate training, since 2003 more than 200 well established companies have adopted our products and services to enhance the technical competency and professional expertise of their employees.

高峰進修學院 (PEAK) 是VTC機構成員，致力為業界提供全面的在職培訓及專業考試服務，擁有超過20年專業及企業人才培訓經驗，實力及規模皆處於領導地位。為配合社會的發展和需要，本學院不斷開設多項培訓課程，涵蓋範圍包括：財經事務、管理專業、資訊科技、語文、建築、地產及物業管理及航空等。單以2012/2013年度計算，已有90,000人報讀本院課程。一直以來，本學院亦積極為僱主提供培訓服務。由2003年至今，已有超過200家大型企業採用本學院的培訓課程或專業服務，藉以提升員工的專業知識和技能。

Contact Us 聯絡我們

Address : 9/F, VTC Tower, 27 Wood Road, Wanchai, HK

Office Hours ** : Mon - Fri : 8:45am - 8:00pm
Sat : 9:00am - 12:00noon
(Closed on Sundays and Public Holidays)

General Inquiry : Tel : 2836 1922
Website : www.peak.edu.hk

學院地址 : 香港灣仔活道27號職業訓練局大樓9字樓

辦公時間** : 星期一至五 : 上午八時四十五分至晚上八時
星期六 : 上午九時至中午十二時
(星期日及公眾假期休息)

一般查詢 : 電話 : 2836 1922
網址 : www.peak.edu.hk

** PEAK's Reception Counter will be closed at 5:15pm on Winter Solstice, Christmas Eve and Lunar New Year's Eve.
(If you have any enquiries about our opening hours on other festive days, please contact us at 2836 1922.)

** 高峰進修學院報名處會於冬至、平安夜及農曆年除夕提早在下午五時十五分關閉。
如對本中心於其他節慶日子的開放時間有疑問，敬請致電2836 1922查詢。





Short Courses
短期課程

Self Enhancement Programme

個人提升課程

Programme Series 課程系列

Men's Forum: Finding The Right Woman 男士論壇：如何選擇最適合的她？

There are a lot more women looking for husbands in Hong Kong than there are men looking for wives, this means men have a large variety of choices. However, the 30% divorce rate in Hong Kong continues to climb and remains one of the highest in the world, this means that in spite of the rich selection the market has to offer, men make poor choices. Finding a life partner is very different from choosing a girlfriend. Come & find out how!

在香港，要尋找丈夫的女士多不勝數，遠超越要尋找妻子的男士。換言之，男士們的選擇極其豐盛，然而香港百分之三十的離婚率卻持續攀升，並已成為世界離婚率最高的城市之一。反映的現象就是儘管選擇眾多，一般男士在花多眼亂的情況下都很容易會作出錯誤的決定。究竟尋找女朋友與終生伴侶有何分別？需要什麼技巧？來聽聽專家們怎麼說吧。

Dating Etiquette 約會的禮儀

"Etiquette" means the code of behavior applicable to a given set of circumstances. Just as first impressions are important at a job interview or meeting a new client, it is likewise important that you act and behave in a civilized manner when you go out on a date – regardless whether or not you find him or her sufficiently interesting. Here we explain some basic rules of dating decorum and some fundamental protocol. Please understand that good behavior has nothing to do with your "date", it reflects on "YOUR" own human decency, and differentiates a gentleman/lady from a rogue.

“禮儀”意味在指定情況下的行為守則。猶如在工作面試或約見客戶時，第一印象是十分重要的。在與異性約會時，不論你對對方有心或無意，態度都應該保持文明得體。請明白，良好的舉止行為事實上與你的約會對象完全無關，它反映的只是你自己作為女性/男性的基本個人風度，尊嚴與內涵，正是與一個自私自大，毫無家教的粗人之別。

What To Talk About On A Date? 應說不應該說

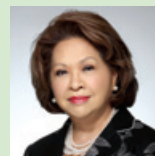
Some people are natural orators, many are not. Some people can strike up an animated conversation with total strangers, others find it painful, they run out of conversations after 10 minutes. The ability to employ speech is a motor skill, to employ speech eloquently is a learned skill, but the ability to engage in an interesting conversation with a stranger without emitting arrogance or drowning the other person in boredom is something else. Find out what you should and should not talk about on a date, how to become a better conversationalist, a better date, a better person and get far better results.

有些人是天生的演說家，許多人卻不是。有些人可自如地與陌生人談笑風生，許多人卻覺得困難，不到十分鐘就再也找不到共同的話題了。談話是一種身體技能，善於雄辯是一種經過訓練的技術。然而，能夠與陌生人自如地聊天，既不會令對方感到你自誇自大，又不會令他人發悶得要命，則是一種與人溝通的技巧。通過這次的講座，了解約會時哪些該說哪些不該說，如何成為一位好的聊天對象，一位優秀的約會對象，就更能得心應手了。

Code 編號	Programme Information 課程資料	Fee 費用	Speaker 講者
PE4200057	男士論壇：如何選擇最適合的她？ Men's Forum: Finding The Right Woman 日期：15.11.14 時間：3:00pm - 5:30pm 時數：2.5小時	中 HK\$350	Mei Ling Ng
PE4200025	約會的禮儀 Dating Etiquette 日期：6.12.14 時間：3:00pm - 5:30pm 時數：2.5小時	中 HK\$350	Regina Barrington, Mei Ling Ng
PE4200027	應說不應該說 What To Talk About On A Date? 日期：10.1.15 時間：3:00pm - 5:30pm 時數：2.5小時	中 EN HK\$350	Kathy Chiron, Mei Ling Ng

中 Taught in Cantonese supplemented with English terminology
EN Taught in English

Speakers 講者



Mei Ling Ng Liu

The "Diamond Matchmaker" – Managing Director of Hong Kong Matchmakers & MeilingCircle.com

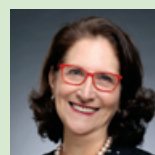
有「鑽石媒人」之稱的香港婚姻介紹所及小綠圈的董事總經理



Regina Lo-Barrington

A registered counsellor and works as a mentor, career coach and relationship coach. Regina has diverse and international background which allows her to quickly understand and connect with people from all walks of life.

註冊輔導員，身兼職涯教練和關係教練。Regina擁有多元化的國際背景，讓她更易瞭解及與來自各行各業的人溝通。



Kathy P. Chiron

Hong Kong's premier Date Coach with professional experience both in Hong Kong and the States include retail, teaching and school administration, public relations and most recently matchmaking.

香港首屈一指的約會教練，擁有在香港及美國多個行業包括零售、教學、學校行政、公共關係及媒人的專業經驗。

Anti-Money Laundering Course for Money Service Operators - Customer Due Diligence and Case Studies

金錢服務經營者打擊洗錢課程 - 客戶盡職審查及個案分析

Speakers 講師



Mr. Jimlian Chan, CPA

As the Hong Kong Money Service Operators Association's Compliance Advisor, Mr. Chan has over 16 years of experience in accounting, auditing, taxation, company secretarial and business consulting etc, of which includes more than 10 years of experience providing professional accounting and consulting services for money service industry. Mr. Chan is also the Compliance Officer and Money Laundering Reporting Officer of a number of licensed money changers and has extensive experience in compiling compliance policies and procedures as well as providing relevant trainings.

陳振廉先生 CPA

陳先生為香港金錢服務業協會合規顧問，擁有超過16年會計、審計、稅務、公司秘書及商業顧問等經驗，當中包括超過10年對金錢服務業的專業會計及顧問服務經驗。陳先生亦為多間金錢服務經營者的合規主任及洗錢報告主任、編寫合規手冊程序，具備豐富培訓經驗。

Enquiry 查詢

Ms. Polly Tam 談小姐

Tel 電話: 2836 1822

Email 電郵: pollytam@vtc.edu.hk

Co-organizer 合辦機構



Sponsor 贊助機構



Programme Objectives 課程目標

This programme, which is jointly organized with the Hong Kong Money Service Operators Association*, is designed for money service operators so as to enable them to better understand the latest statutory and regulatory requirements regarding Customer Due Diligence of Anti-Money Laundering and Counter-Terrorist Financing. This will also raise participants' awareness of the importance of Customer Due Diligence so that they can help to detect irregular or suspicious financial activities.

本課程由本院與香港金錢服務業協會*合辦。旨在幫助金錢服務經營者更了解《打擊洗錢及恐怖分子資金籌集（金融機構）條例》及《打擊洗錢及恐怖分子資金籌集指引（金錢服務經營者適用）》的法例要求，提高從業員對客戶盡職審查的防範意識，加深對客戶的了解及偵察異常或可疑活動，藉此提昇金錢服務經營者的合規水平。

* About Hong Kong Money Service Operators Association (MSOA) 香港金錢服務業協會簡介

Hong Kong Money Service Operators Association Limited as a non-profit organization, MSOA aims to represent and protect the interests of money service operators, maintain communication with government departments, strive to assist Hong Kong to align with requirements set out by international organizations, and at the same time provide members a platform to share market information and experiences as well as to provide workshops and seminars on relevant law and regulations for working and non-working force.

香港金錢服務業協會有限公司為一個非牟利機構，協會旨在代表和保障金錢服務業經營者權益，與政府部門保持溝通，竭力協助香港符合國際相關組織要求，同時提供一個讓會員分享市場資訊和經驗的平台，並提供條例教學及講座，供在職及非在職人士參加。

Who Should Attend 適合人士

This course will be of interest to money service practitioners and other related parties

從事金錢服務業及其相關人士

Contents 課程內容

- Brief introduction to Anti-Money Laundering and Counter-Terrorist Financing (Financial Institutions) Ordinance and the Guideline on Anti-Money Laundering and Counter-Terrorist Financing (For Money Service Operators)
- When Customer Due Diligence (CDD) should be conducted
- CDD requirement on individual customers and differences of that between Hong Kong residents and non-Hong Kong residents
- CDD requirement on corporate customers and differences of that for various modes of incorporation, including local and overseas companies
- Definition of beneficial owner
- When Simplified Customer Due Diligence should be conducted
- When Enhanced Customer Due Diligence should be conducted
- Ways to define Politically Exposed Person (PEP)

- Understanding tools for background check
- Risk assessment
- Understand related penalties
- How to identify Suspicious Transactions
- Discuss and analyze CDD cases
- 簡介《打擊洗錢及恐怖分子資金籌集（金融機構）條例》及《打擊洗錢及恐怖分子資金籌集指引（金錢服務經營者適用）》
- 何時需進行客戶盡職審查
- 講述個人客戶的盡職審查要求，對香港居民客戶及非香港居民客戶的要求分別
- 講述公司客戶的盡職審查要求，對以不同形式成立的公司客戶的要求分別，包括本地及海外註冊公司
- 認識實益擁有人的定義
- 何時可進行簡化的客戶盡職審查
- 何時需要進行更嚴格的客戶盡職審查
- 如何界定政治人物
- 認識客戶背景檢查工具
- 風險情況評估
- 認識相關罰則
- 如何識別可疑交易
- 研討有關客戶盡職審查的個案

Medium of Instruction 教學語言

Cantonese supplemented with Chinese written materials

廣東話輔以中文講義

Code 編號	Programme Information 課程資料	Fee 費用
PE4200051	金錢服務經營者打擊洗錢課程 - 客戶盡職審查及個案分析 Anti-Money Laundering Course for Money Service Operators - Customer Due Diligence and Case Studies 日期：27.11.14 (Thu) 時間：7:30pm - 9:30pm 時數：2小時	HK\$200 Or HK\$100* (*licensed money service operators only)

*** Fee Discount:**

The fee for licensed money service operators is HK\$100 per person. To verify the eligibility to the special fee, licensed money service operators must enroll in the course through the Hong Kong Money Services Association at Tel: 3176 2004, Email: info@msoa.hk, Fax: 3010 8582 or its office address: A2/F, Dolford Mansion, 1-3 Chatham Court, Tsim Sha Tsui, Kowloon.

學費優惠：

金錢服務經營者報讀本課程只須每位HK\$100。惟必須經由香港金錢服務業協會報名，以核實資格。報名可聯絡香港金錢服務業協會
 電話：3176 2004、傳真：3010 8582、電郵：info@msoa.hk
 地址：九龍尖沙咀漆咸圍1-3號多福大廈2樓A室

Speakers 講師



Mr. Vincent Tse, AHKIB, CFA, CPA, FCCA, MBA

Vincent is the founding Chief Executive Officer of Hong Kong Money Service Operators Association which specializes in serving the Hong Kong money service industry. He has more than 16 years of experience in advisory, finance and banking services. With extensive expertise in finance and statutory compliance, he has held senior position in the advisory practice in one of the global big four accounting firms working with clients mainly from regulated industries. He holds a Bachelor's degree in Business Administration (Finance) and a Master's degree in Business Administration from two reputed universities in Hong Kong respectively. He is also a Chartered Financial Analyst, an Associate of the Hong Kong Institute of Bankers, a member of Hong Kong Institute of Certified Public Accountants and a fellow member of the Association of Chartered Certified Accountants. In addition, he was invited as Speaker in the ACAMS 6th Annual AML & Financial Crime Conference Asia Pacific organized by the Association of Certified Anti-Money Laundering Specialists ("ACAMS") this year.

謝天能先生 AHKIB, CFA, CPA, FCCA, MBA

謝先生為香港金錢服務業協會創會行政總裁。謝先生擁有超過16年會計諮詢、金融及銀行經驗，並曾任職於全球四大會計師事務所，主要職責是審查客戶的經營業績，提供分析和諮詢服務。謝先生分別於香港兩大著名大學取得工商管理（財務學）學士學位及工商管理碩士學位，謝先生亦取得特許金融分析師資格，以及為香港銀行學會會員，並同時為香港會計師公會會員及特許公認會計師公會資深會員。此外，本年初謝先生獲邀前往馬來西亞出席由「國際公認反洗錢師協會」舉辦的第六屆反洗錢及金融犯罪亞太區年度會議，並擔任講師。



New CPD Programmes
全新持續專業發展課程

使命宣言重整

本課程由「香港保險中介人商會」(HKCII) 擁有

課程目的：

- 讓學員認識如何透過建立使命宣言，為自身保險事業帶來突破

課程對象：

香港保險代理公司、經紀公司的東主及負責人；甚至其他行業的東主及負責人。

課程大綱：

- 使命宣言概要
- 企業、組織及政府的目的宣言
- Mission (使命) vs Vision (願景)
- 個人使命宣言vs企業使命宣言
- 如何寫好使命宣言
- 使命宣言 = 成功的事業？
- VMOSA模型

課程特色：

由經驗豐富的業界人士現身說法。採用互動學習形式，透過講課及個案分享，使學員掌握重整使命宣言的技巧。

Enquiry 查詢

Ms. Jenny Chu 朱小姐

Tel 電話: 2919 1404

Email 電郵: chu_chu_623@vtc.edu.hk



Code 編號	Programme Information 課程資料		Fee 費用	SFC CPT credits 證監會CPT	MPFA CPD credits 積金局CPD	IA CPD hours 保監處CPD	Category 類別
PE4200053	使命宣言重整 日期：8.11.14 (Sat) 時間：2:00pm - 4:00pm 時數：2小時	中	HK\$180 (包括由HKCII 簽發的學分 證明)	-	2 non-core	2	MPF & Others

✦ These programmes are solely owned by the Hong Kong Chamber of Insurance Intermediaries

中 中文教材 Chinese materials

Utilizing Customer Value Creation Strategy in Insurance Industry for Better Sales Performance

應用客戶增值策略提昇保險銷售業績

Facilitator

Ms. Cindy Cheng,

BA, ANZIIF (Fellow), DMCC, DBA (candidate)

Cindy has extensive insurance experience acquired from roles she has held at major insurer, reinsurer and international insurance brokers in Hong Kong. She has worked in insurance industry for over 20 years and has experiences in corporate customer servicing, sale, marketing and new business development of general insurance. She is also experienced in delivering seminars for major corporate clients and different professional associations.

Code: PE4200055

Programme Introduction

This programme is designed for insurance and financial intermediaries to understand the effective customer emphasised strategy utilizing in new business development and marketing management in insurance industry for better firm performance under the competitive market.

Programme Objectives

In today's changing business environment, under highly competitive market condition, firms need to focus on their customers. This programme introduces customer value creation strategy which will advance your marketing capability to gain sales growth.

Who Should Attend?

- Insurance and finance intermediaries and persons who are interested in marketing
- Executives especially responsible for client servicing, sales and/or marketing promotion

Programme Contents

- concept of customer orientation culture
- what is "customer value creation" strategy?
- why is it important in boosting sales growth?
- how to apply this strategy in insurance and finance industry?
- Insurance Case Study, Analysis and Discussion
- workshop on insurance new product innovation through customer value creation strategy

Code 編號	Programme Information 課程資料	Fee 費用	SFC CPT credits 證監會CPT	MPFA CPD credits 積金局CPD	IA CPD hours 保監處CPD	Category 類別
PE4200055	應用客戶增值策略提昇保險銷售業績 Utilizing Customer Value Creation Strategy in Insurance Industry for Better Sales Performance Date: 21.11.14 Time: 2:00pm - 6:00pm Duration: 4 hours	HK\$360	-	4 non-core	4	General Insurance

* These courses are co-organized with Professional Insurance Brokers Association (PIBA) and will be recognized as IA - CPD credits. Members of PIBA can directly enroll via PIBA to obtain member discounts.

中 Taught in Cantonese supplemented with English terminology

EN English materials

Practical Aspects of Occupational Safety and Employees' Compensation Insurance Underwriting

職業安全行業應用及工傷風險承保實戰策略

本課程由「香港保險中介人商會」(HKCII) 擁有

課程目的：

- 助學員認識職業安全相關法律條文
- 助學員認知保險從業員工作的潛在危險及預防措施
- 助學員認識職安與僱員補償保險的關係
- 助學員認識不同行業的職安情況，從而對投保僱員補償保險創造更有利條件

課程對象：

香港保險代理公司、經紀公司的東主及負責人；裝修業、清潔業、保安業、物流業東主及負責人。

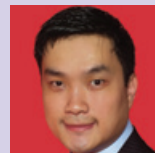
課程摘要：

本課程詳細解釋本港一般職業安全法例，僱員補償保險及其相關知識，以助投保時順利爭取到最佳條件。

課程特色：

由經驗豐富的業界人士現身說法。採用互動學習形式，透過講課及個案分享，使學員掌握本港特定行業難以買得僱員補償保險的原因，了解索償程序及要點，在現實情況可善加應用，可謂理論與實際並重。

講者簡介：



李俊明先生於1998年加入保險業，曾服務於不同的國際保險公司、保險經紀公司及銀行。現職為 Seascope Risk Services (Hong Kong) Limited 執行董事（“Seascope”是1970年在英國成立註冊的勞社保險經紀公司）。李先生畢業於英國林肯大學主修工商管理，期後獲得教育、法律及電子商貿等學位，現正修讀哲學博士。2013年李先生獲“澳大利亞及新西蘭保險與金融學會”委任為亞洲區董事參與澳洲董事會。

Code 編號	Programme Information 課程資料	Fee 費用	SFC CPT credits 證監會CPT	MPFA CPD credits 積金局CPD	IA CPD hours 保監處CPD	Category 類別
PBA00035	職業安全行業應用及工傷風險承保實戰策略 Practical Aspects of Occupational Safety and Employees' Compensation Insurance Underwriting 日期：22.11.14 (Sat) 時間：10:00am - 1:00pm 時數：3小時	HK\$270 (包括由HKCII 簽發的學分 證明)	-	3 non-core	3	General Insurance

✦ These programmes are solely owned by the Hong Kong Chamber of Insurance Intermediaries

Enquiry 查詢

Ms. Jenny Chu 朱小姐
 Tel 電話: 2919 1404
 Email 電郵: chu_chu_623@vtc.edu.hk

Advanced Management Skills for Financial Professionals

金融專業人士管理技巧（進階課程）

Enquiry 查詢

Ms. Polly Tam 談小姐
Tel 電話: 2836 1822
Email 電郵: pollytam@vtc.edu.hk



課程內容：

單元一：分析和創作力解難技巧（3小時）

在現今競爭激烈的工作環境下，有效解決問題的技巧已是越來越多成功人士的先決條件。通過本課程，學員將學習到如何運用分析和創作力去解決難題的要領。

- 什麼是問題？
- 延誤找到最佳解決方案的障礙
- 解難模式
- 為問題下定義
- 開發創意的工具
- 腦力激盪
- 決策標準
- 決策技巧
- 如何表達你的解決方案？

- 事前計劃
- 基本原則
- 支持性溝通
- 教練模式
- 最佳教練實踐

單元三：工作與生活共融的時間管理（3小時）

相信大多數管理者都曾經感受過勞累，和好像永遠不夠時間去完成全部工作的困擾。尋根究底，可能時間管理才是至關重要的原因。通過本課程，學員將了解到如何能有效地善用時間，更精明地工作，更理想地融合工作與生活。

- 時間是禮物
- 典型的時間使用方式
- 浪費時間
- 時間管理策略
- 守時、達標的管理
- 重要和緊急矩陣
- 目標設定
- 計劃、優先、時間分配
- 如何騰出更多的時間？

單元二：客服主管的教練技巧（5小時）

在金融服務行業，擁有教練技巧和心態是服務主管成功帶領團隊不可或缺的要害。通過本課程，學員將可領會到有效的教練輔導，如何提高和保持優良的服務環境。

- 教練的力量
- “教練”與“管理”
- “教練”與“輔導”
- 識別教練機會

Code 編號	Programme Information 課程資料	Fee 費用	SFC CPT credits 證監會CPT	MPFA CPD credits 積金局CPD	IA CPD hours 保監處CPD	Category 類別
PE4200048	金融專業人士管理技巧（進階課程） 單元一：分析和創作力解難技巧 Advanced Management Skills for Financial Professionals Module 1: Solving Problems Analytically and Creatively 日期：26.11.14 (Wed) 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills
PE4200049	金融專業人士管理技巧（進階課程） 單元二：客服主管的教練技巧 Advanced Management Skills for Financial Professionals Module 2: Coaching Skills for Service Leaders 日期：2.12.14 (Tue) 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
PE4200050	金融專業人士管理技巧（進階課程） 單元三：工作與生活共融的時間管理 Advanced Management Skills for Financial Professionals Module 3: Managing Time for Work-Life Integration 日期：16.12.14 (Tue) 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills

Lessons from the Financial Disasters

金融災難的教訓

Programme Introduction

This programme is suitable for the finance practitioners including insurance intermediaries who want to know the key factors that led to and the lessons learned from risk management case studies.

Programme Contents

1. Overview of financial risk management
2. Disasters due to misleading reporting: Barings Bank, Societe Generale
3. Disasters due to large market moves: Long-Term Capital Management, Metallgesellschaft
4. Disasters due to the conduct of customer business: Bankers Trust, JP Morgan, Citigroup and Enron
5. Other cases
6. Risk management failures

Facilitator

Dr. Ricky Chung, B.Sc, MBA, M.Sc, LL.M, DBA, CFA, CFPCM, FRM, CMA

Dr. Chung is currently the Director of CNN Financial Training & Consultancy Limited. Before he found the company in 2012, he was the Senior Programme Manager of Finance cum the Team Leader of Business & Management in The Open University of Hong Kong (LiPACE). He has gained extensive experiences in financial industry and education sector for over 20 years as Research Analyst, Dealer of Securities and Derivatives products, and Dealing Manager (Head of Futures). Since 1998, he has been devoting his time in the academic field as being a part-time instructor teaching finance related courses, full-time College Lecturer in HKU SPACE, a Manager of Curriculum and Examination Department in Hong Kong Securities Institute, and OUHK LiPACE.

Ricky received his Doctoral degree in Business, an MBA, a M.Sc in Finance and a Master of Laws in International Corporate and Financial Law (LLM). Apart from his academic credentials, Ricky has earned various professional designations including CFPCM certification, CFA, FRM and CMA designations.

Code 編號	Programme Information 課程資料	Fee 費用	SFC CPT credits 證監會CPT	MPFA CPD credits 積金局CPD	IA CPD hours 保監處CPD	Category 類別
PE4200054	金融災難的教訓 Lessons from the Financial Disasters 日期：2.12.14 時間：2:30pm - 5:30pm 時數：3小時	PIBA CPD* 中 EN HK\$270	3	3 non-core	3	Management & Soft Skills

* These courses are co-organized with Professional Insurance Brokers Association (PIBA) and will be recognized as IA - CPD credits. Members of PIBA can directly enroll via PIBA to obtain member discounts.

🗣️ Taught in Cantonese supplemented with English terminology

📄 English materials

Enquiry 查詢

Ms. Jenny Chu 朱小姐

Tel 電話: 2919 1404

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The Long Term Insurance Market

Facilitator



Mr. David Herratt FCII, FIRM,
Chartered Insurance Broker

David has over 30 years risk management and insurance experience. He has held senior management positions in London, Stockholm, the Middle East and Asia, working with the Skandia Group, CLP Power, Hong Kong, Lloyd's (of London), Thomas Miller Risk Management, William Russell Limited, Hampden Capital Limited, Swiss Insurance Partners, Crosby Capital Limited.

David is a visiting guest lecturer at the Singapore College of Insurance, part time lecturer at the VTC, PEAK and Lingnan University. He is a Fellow of the Chartered Insurance Institute by examination and a Fellow of the Institute of Risk Management and is a regular conference speaker and seminar facilitator.

Enquiry 查詢

Ms. Jenny Chu 朱小姐
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Programme Introduction

Long term insurance has often been described as the bread and butter of insurance cover. Yet it is a rapidly changing market that faces major pressures and strategic challenges.

This programme opens with looking at the way the public views long term insurance. How the industry has adapted its structure, products and practices to cater for the rapidly altering social and economic environment.

Who Should Attend?

- New comers to the long term insurance business
- Financial institutions including bankers or Insurers
- Insurance brokers
- Investment advisors
- Intermediaries
- Senior executives responsible for application of long term insurance in their organisation
- Non-life practitioners who want to broaden their understanding about the life market and where it crosses over with non-life products
- Directors and Non Executive Directors

Programme Contents

- A. The long term insurance market
- B. The need
- C. Government intervention
- D. Providers
- E. Intermediaries
- F. Direct purchasing
- G. Market associations


Outcomes

After the seminar participants should be able to:

- Understand
 - the factors which motivate customers to purchase long term insurance
 - Factors influencing direct to customer marketing
 - Roles of the trade bodies involved in long term insurance
- Differentiate between the different types of intermediaries involved in the provision of advice

Code 編號	Programme Information 課程資料	Fee 費用	SFC CPT credits 證監會CPT	MPFA CPD credits 積金局CPD	IA CPD hours 保監處CPD	Category 類別
PE4200056	The Long Term Insurance Market Date: 13.1.15 Time: 2:15pm - 5:15pm Duration: 3 hours	PIBA CPD*  HK\$270	-	3 non-core	3	Life & Health Insurance

* These courses are co-organized with Professional Insurance Brokers Association (PIBA) and will be recognized as IA - CPD credits. Members of PIBA can directly enroll via PIBA to obtain member discounts.

 Taught in English



Insurance CPD & Banking Programmes
保險業CPD及銀行業課程

Insurance CPD & Banking Programmes 保險業CPD及銀行業課程

Trainees who attend PEAK programmes are required to adhere to the guidelines stipulated in the “Programme Administration Guidelines” section of this Prospectus. In particular, **CPD Trainees should read the “CPD Programme – Notes to Trainees” carefully.**

報讀高峰進修學院課程之學員均須遵守載列於本課程手冊「課程管理指引」中的守則。此外，持續專業發展課程之學員亦應特別注意及遵守指引內的「持續專業發展課程 — 學員須知」。

以下課程以日期排序：

The following programmes are sorted **by date**:

- General Insurance
- Investment & Financial Planning
- Law & Compliance
- Life & Health Insurance
- Management & Soft Skills
- MPF & Others

Code 編號	Programme Information 課程資料	Fee 費用	SFC CPT credits 證監會CPT	MPFA CPD credits 積金局CPD	IA CPD hours 保監處CPD	Category 類別
175E3	瞭解你的保險客戶 (樓宇建築業) - 建築方法與安全事宜 Understanding Insurance Clients (Building Construction Industry) - Methods and Safety 日期：1.11.14 時間：1:30pm - 6:30pm 時數：5小時	# HK\$450	-	5 non-core	5	General Insurance
PE4200034	投資策劃 (基金) Investment Planning (Mutual Funds) 日期：3.11.14 & 10.11.14 時間：6:30pm - 9:00pm 時數：5小時 (共2堂)	中 HK\$450	5	5 non-core	5	Investment & Financial Planning
SC-1312-07	「身心語言程式學」工作坊 單元一：財經服務業的NLP應用技巧 Boost Your Work Competence with NLP Module 1: Application of NLP in Financial Services Environment 日期：5.11.14 時間：3:00pm - 5:00pm 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
PBA00063	協助客人避免漏報 (壽險及醫療險) Help Your Clients Avoid Non-disclosure (Life & Medical Insurance) 日期：5.11.14 時間：3:30pm - 5:30pm 時數：2小時	HK\$180	-	2 non-core	2	Life & Health Insurance
PE4200022	保險及金融法規遵守 - PIBA CPD* 中 中 打擊洗錢及恐怖分子資金籌集 Insurance and Financial Regulatory Compliance - Anti-Money Laundering and Counter - Terrorist Financing 日期：5.11.14 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Law & Compliance
SC-2074-12	危機管理 - 認識危機的因緣和合 日期：6.11.14 時間：10:00am - 1:00pm 時數：3小時	中 HK\$270	3	3 non-core	3	Management & Soft Skills
SC-1887-10	銷售奇才研習坊 (保險及投資專業人士) 單元一：銷售藝術 Selling Genius Workshop (Insurance and Investment Professionals) Module 1: The Art of Selling 日期：6.11.14 時間：3:00pm - 5:00pm 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
736F2	亞洲證券市場 單元一：亞洲證券市場概述 Asian Securities Markets Module 1: Overview of Asian Securities Markets 日期：6.11.14 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning

These programmes contain no contents on construction insurance.

* These courses are co-organized with Professional Insurance Brokers Association (PIBA) and will be recognized as IA - CPD credits. Members of PIBA can directly enroll via PIBA to obtain member discounts.

中 Taught in Cantonese supplemented with English terminology

中 中文教材 Chinese materials

Code 編號	Programme Information 課程資料	Fee 費用	SFC CPT credits 證監會CPT	MPFA CPD credits 積金局CPD	IA CPD hours 保監處CPD	Category 類別
815E2	風險評估及管理(財經業人士)單元一：風險評估 Risk Assessment and Management for Financial Service Executives Module 1: Identifying and Measuring Risk Factors 日期：6.11.14 & 10.11.14 時間：6:30pm - 9:00pm 時數：5小時(共2堂)	HK\$450	5	5 non-core	5	Investment & Financial Planning
271I1	適用於人壽保險的法律原則 Legal Principles Applicable to Life Insurance 日期：7.11.14 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	-	5 non-core	5	Life & Health Insurance
396E2	強積金最新發展 MPF Recent Development 日期：7.11.14 時間：6:30pm - 8:30pm 時數：2小時	HK\$285	2	2 core	2	MPF & Others
811E2	個人績效登峰(保險及投資專才系列)單元一：高效自我規劃 Transcend Your Personal Effectiveness (Insurance & Investment Professionals Series) Module 1: Effective Self Planning 日期：7.11.14 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills
SC-2060-11	說服技巧(金融服務業專才)單元一：掌握說服技巧•獲取理想成果 Persuasion Skills for Financial Professionals Module 1: Master Persuasion Skills to Get Exactly What You Want 日期：8.11.14 時間：9:00am - 2:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
PBA00038	代理人法 日期：8.11.14 時間：10:00am - 1:00pm 時數：3小時	✚ 中 HK\$270	-	3 non-core	3	Law & Compliance
PE420053	使命宣言重整 日期：8.11.14 時間：6:45pm - 8:45pm 時數：2小時	NEW ✚ 中 HK\$180	-	2 non-core	2	MPF & Others
828E2	投資策略系列 單元四：即日交易投資策略 Investment Strategies Series Module 4: Short Term Intraday Trading Strategies 日期：10.11.14 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
411B2	股票圖表走勢分析 單元二：陰陽燭 Technical Analysis Module 2: Japanese Candlestick 日期：10.11.14 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
SC-2076-12	危機管理 - 同行如敵國? 日期：11.11.14 時間：10:00am - 1:00pm 時數：3小時	中 HK\$270	3	3 non-core	3	Management & Soft Skills
827E2	投資策略系列 單元三：中線波段投資策略 Investment Strategies Series Module 3: Medium Term Swing Investment Strategies 日期：11.11.14 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning

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中 中文教材 Chinese materials

Code 編號	Programme Information 課程資料	Fee 費用	SFC CPT credits 證監會CPT	MPFA CPD credits 積金局CPD	IA CPD hours 保監處CPD	Category 類別
726E2	「不言而喻」的奧妙 - 保險從業員工作坊 單元一：非語言溝通新體驗 Communicating without Talking for Insurance Practitioners Module 1: Non-verbal Communications Overview 日期：11.11.14 時間：6:30pm - 8:30pm 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
PBA00019	變革管理技巧 單元一：了解不斷變化的環境 Essential Skills for Change Management Module 1: Understand the Changing Environment 日期：11.11.14 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills
392E2	“DISC” 性格創富 (保險專業人士) 學習坊 單元一：DISC的基本概念 DISC Profiling for Business and Personal Enhancement (Insurance Professionals) Workshop Module 1: What is DISC? 日期：12.11.14 時間：2:00pm - 4:00pm 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
PE4200032	保險從業員須具備的醫學知識 - 病史申報 Medical Knowledge for Insurance Practitioners - Medical Examinee's Disclosure 日期：12.11.14 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	-	3 non-core	3	Life & Health Insurance
PE4200042	財富管理技巧深造系列 單元一：基金投資實務錦囊 Achieving Wealth Management Excellence Series Module 1: Best Practice Sharing in Selling Investment Funds 日期：12.11.14 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
451D2	主要經濟指標與投資策劃 單元一：經濟指標初探 Key Economic Indicators and Investment Planning Module 1: Overview of Economic Indicators 日期：12.11.14 & 13.11.14 時間：6:30pm - 8:30pm 時數：4小時 (共2堂)	HK\$360	4	4 non-core	4	Investment & Financial Planning
SC-2068-11	銷售要訣 (財經專才系列) 單元一：“High I.M.P.A.C.T.” 高效銷售 Sales Essentials for Financial Professionals Module 1: “High I.M.P.A.C.T.” Sales Model and Techniques 日期：13.11.14 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
PE4200043	財富管理技巧深造系列 單元二：資產配置及調整策略 Achieving Wealth Management Excellence Series Module 2: Asset Allocation Decision and Rebalancing Strategies 日期：14.11.14 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
SC-2082-12	強化影響力課程 單元一：影響力與激勵 Strengthening Your Influential Power Course Module 1: Influential Power & Motivation 日期：14.11.14 時間：3:00pm - 5:00pm 時數：2小時	HK\$180	2	2 non-core	2	General Insurance


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753F2	商業道德操守 (金融業) 單元一：簡介 Business Ethics in the Finance Sector Module 1: Introduction 日期：15.11.14 時間：9:00am - 11:00am 時數：2小時	HK\$180	2	2 non-core	2	General Insurance
754F2	商業道德操守 (金融業) 單元二：商業道德的構成 Business Ethics in the Finance Sector Module 2: Framing Business Ethics 日期：15.11.14 時間：11:15am - 2:15pm 時數：3小時	HK\$270	3	3 non-core	3	General Insurance
172I3	瞭解你的保險客戶 (樓宇建築業) - 項目發展 Understanding Insurance Clients (Building Construction Industry) - Project Development 日期：15.11.14 時間：1:30pm - 6:30pm 時數：5小時	# HK\$450	-	5 non-core	5	General Insurance
611F3	股市技術分析課程 單元一：成交量、未平倉合約 Advanced Technical Analysis Module 1: Volume, Open Interest 日期：17.11.14 時間：2:00pm - 5:00pm 時數：3小時	Hk\$270	3	3 non-core	3	Investment & Financial Planning
816E2	風險評估及管理 (財經業人士) 單元二：案例回顧 Risk Assessment and Management for Financial Service Executives Module 2: The Bloody Stories of Loss - Case Study 日期：17.11.14 時間：6:30pm - 8:30pm 時數：2小時	HK\$180	2	2 non-core	2	Investment & Financial Planning
616F2	投資產品發展近況 單元一：定息產品 Current Development on Investment Products Module 1: Fixed Income Products 日期：17.11.14 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
PE4200035	投資策劃 (證券) Investment Planning (Equity Securities) 日期：17.11.14 & 24.11.14 時間：7:00pm - 9:00pm 時數：4小時 (共2堂)	中 HK\$360	4	4 non-core	4	Investment & Financial Planning
294E2	商務人際網絡的建立 - 保險從業員工作坊 單元一：建立商務人際網絡的藝術 Business Networking Workshop for Insurance Practitioners Module 1: An Introduction to the Art of Networking 日期：18.11.14 時間：3:00pm - 5:00pm 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
749E2	旅遊保險 (法律責任) Travel Insurance (Legal Liability) 日期：18.11.14 時間：6:45pm - 9:45pm 時數：3小時	中 HK\$270	-	3 non-core	3	General Insurance
PE4200058	財富管理技巧深造系列 單元三：探討各種不良投資習慣 Achieving Wealth Management Excellence Series Module 3: Reviewing Common Bad Investment Habits 日期：19.11.14 時間：1:00pm - 3:00pm 時數：2小時	NEW HK\$180	2	2 non-core	2	Investment & Financial Planning

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中 中文教材 Chinese materials

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PE4200059	財富管理技巧深造系列 單元四：改正不良投資習慣 Achieving Wealth Management Excellence Series Module 4: Rectification of Bad Investment Habits 日期：19.11.14 時間：3:00pm - 6:00pm 時數：2小時	 HK\$270	3	3 non-core	3	Investment & Financial Planning
PE4200033	保險從業員須具備的醫學知識 - 體檢報告 Medical Knowledge for Insurance Practitioners - Medical Examiner's Report 日期：19.11.14 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	-	3 non-core	3	Life & Health Insurance
727E2	「不言而喻」的奧妙 - 保險從業員工作坊 單元二：非語言溝通技巧 I - 商業禮儀 Communicating without Talking for Insurance Practitioners Module 2: Non-verbal Communication Skills I 日期：19.11.14 時間：6:30pm - 8:30pm 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
396E2	強積金最新發展 MPF Recent Development Date: 19.11.14 Time: 6:30pm - 8:30pm Duration: 2 hours	 HK\$285	2	2 core	2	MPF & Others
PBA00022	社交媒體和雲端競爭優勢 (金融專才) 單元一 Social Media Marketing and Cloud Competitive Advantages for Financial Professionals Module 1 日期：19.11.14 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills
SC-2077-12	危機管理 - 危機有常？無常？ 日期：20.11.14 時間：10:00am - 1:00pm 時數：3小時	 HK\$270	3	3 non-core	3	Management & Soft Skills
222C2	透視個性知己知彼 單元一：加深自我認識 Managing Self and Relationship Through Enneagram Module 1: Enhancing Self-understanding 日期：20.11.14 時間：2:00pm - 6:00pm 時數：4 小時	 HK\$360	4	4 non-core	4	Management & Soft Skills
817E2	風險評估及管理 (財經業人士) 單元三：從財務報表中分析風險的技巧I Risk Assessment and Management for Financial Service Executives Module 3: Techniques of Reading Risks from Financial Statements I 日期：20.11.14 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
731F2	互聯網時代的商機和人事 (金融服務專業人員) 單元一：互聯網技術在現今金融服務行業的運用概覽 Dealing with Business and People Successfully in the Internet Age (Financial Service Professionals) Module 1: Overview of Application of Internet Technologies in Today's Financial Service Industry 日期：20.11.14 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills


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162I2	<p>銷售人壽保險的法律須知 Legal Knowledge for Life Insurance Selling</p> <p>日期：21.11.14 時間：1:00pm - 6:00pm 時數：5小時</p>	HK\$450	-	5 non-core	5	Life & Health Insurance
739F2	<p>企業智庫個案課程（金融服務專業人士） 單元一：中國人壽 - 人員銷售 Trade Treasure Case-based Training Programme for Financial Service Professionals Module 1: China Life - Personal Selling Through the Good and Bad Times</p> <p>日期：21.11.14 時間：1:00pm - 6:00pm 時數：5小時</p>	HK\$450	5	5 non-core	5	General Insurance
PE4200055	<p>應用客戶增值策略提昇保險銷售業績  NEW PIBA CPD*   Utilizing Customer Value Creation Strategy in Insurance Industry for Better Sales Performance</p> <p>Date: 21.11.14 Time: 2:00pm - 6:00pm Duration: 4 hours</p>	HK\$360	-	4 non-core	4	General Insurance
763F2	<p>處理金融糾紛的準備和進階技巧課程 單元一：介紹金融糾紛調解計劃與何謂衝突 Advanced Skills in Handling Financial Disputes and Preparing for the FDRC Workshop Module 1: Introduction of Financial Dispute Resolution Scheme and Conflict</p> <p>日期：21.11.14 時間：6:30pm - 9:30pm 時數：3小時</p>	HK\$330	3	3 non-core	3	General Insurance
SC-2061-11	<p>說服技巧（金融服務專業才）單元二：超卓的說服技巧 Persuasion Skills for Financial Professionals Module 2: Excel Your Persuasion Skills</p> <p>日期：22.11.14 時間：9:00am - 12:00pm 時數：3小時</p>	HK\$270	3	3 non-core	3	Management & Soft Skills
718E2	<p>領導的教練技術  Coaching as a Leadership Tool</p> <p>日期：22.11.14 時間：9:00am - 2:00pm 時數：5 小時</p>	HK\$450	5	5 non-core	5	Management & Soft Skills
PBA00035	<p>職業安全行業應用及工傷風險承保實戰策略  NEW  Practical Aspects of Occupational Safety and Employees' Compensation Insurance Underwriting</p> <p>日期：22.11.14 時間：10:00am - 1:00pm 時數：3小時</p>	HK\$270	-	3 non-core	3	General Insurance
PBA00037	<p>財策的奧妙  日期：22.11.14 時間：2:00pm - 4:00 pm 時數：2小時</p>	HK\$180	-	2 non-core	2	Investment & Financial Planning
SC-1313-07	<p>「身心語言程式學」工作坊 單元二：NLP溝通能量增強法 Boost Your Work Competence with NLP Module 2: Enhance Your Communication Power through NLP</p> <p>日期：24.11.14 時間：1:00pm - 6:00pm 時數：5小時</p>	HK\$450	5	5 non-core	5	Management & Soft Skills

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 English materials

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820E2	投資產品發展近況 單元六：股票期權及潛在風險 Current Development on Investment Products Module 6: Stock Options Trading and Its Risks 日期：24.11.14 & 25.11.14 時間：6:30pm - 9:30pm 時數：6小時（共2堂）	HK\$540	6	6 non-core	6	Investment & Financial Planning
612F3	股市技術分析課程 單元二：動量指標、變速率、乖離率、威廉指標、淨值成交量 Advanced Technical Analysis Module 2: Momentum, Rate of Change, BIAS, William's Index, OBV (On Balance Volume) 日期：25.11.14 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Investment & Financial Planning
860E2	網絡保險 Cyber Insurance 日期：25.11.14 時間：6:45pm - 9:45pm 時數：3小時	HK\$270	-	3 non-core	3	General Insurance
295E2	商務人際網絡的建立 - 保險從業員工作坊 單元二：建立商務人際網絡全攻略 Business Networking Workshop for Insurance Practitioners Module 2: An Overview of Networking Strategies 日期：26.11.14 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
PE4200048	金融專業人士管理技巧（進階課程） 單元一：分析和創作力解難技巧 Advanced Management Skills for Financial Professionals Module 1: Solving Problems Analytically and Creatively 日期：26.11.14 時間：2:00pm - 5:00pm 時數：3小時	NEW HK\$270	3	3 non-core	3	Management & Soft Skills
PBA00063	協助客人避免漏報（壽險及醫療險） Help Your Clients Avoid Non-disclosure (Life & Medical Insurance) 日期：26.11.14 時間：3:30 pm - 5:30 pm 時數：2小時	HK\$180	-	2 non-core	2	Life & Health Insurance
606F2	保險從業員的行業分析與股票投資系列 單元一：金融股 Industry Analysis and Stock Investment Series for Insurance Practitioners Module 1: Finance and Insurance 日期：26.11.14 & 27.11.14 時間：6:30pm - 9:30pm 時數：6小時（共2堂）	HK\$540	6	6 non-core	6	Investment & Financial Planning
812E2	個人績效登峰（保險及投資專才系列） 單元二：個人績效登峰的首七堂課 Transcend Your Personal Effectiveness (Insurance & Investment Professionals Series) Module 2: First 7 Lessons to the Highest Personal Effectiveness 日期：27.11.14 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
148I3	保險相關刑事法律 Criminal Law Relating to Insurance 日期：27.11.14 & 4.12.14 時間：6:30pm - 9:00pm 時數：5小時（共2堂）	HK\$450	-	5 non-core	5	General Insurance

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393E2	<p>“DISC” 性格創富 (保險專業人士) 學習坊 單元二：保險專業人士的DISC分析 DISC Profiling for Business and Personal Enhancement (Insurance Professionals) Workshop Module 2: The Interpretation of DISC by Insurance Professionals</p> <p>日期：28.11.14 時間：2:00pm - 6:00pm 時數：4 小時</p>	HK\$360	4	4 non-core	4	Management & Soft Skills
PE4200016	<p>強積金資訊重溫和更新 MPF Informamtion Review & Updates</p> <p>日期：28.11.14 時間：6:30pm - 8:30pm 時數：2小時</p>	HK\$285	2	2 core	2	MPF & Others
PBA00041	<p>心靈管理系列 - 壓力管理 單元一：工作壓力面面觀 Mind Management Series - Stress Management Module 1: Introduction of Stress</p> <p>日期：29.11.14 時間：9:00am - 12:00pm 時數：3小時</p>	HK\$270	3	3 non-core	3	Management & Soft Skills
PBA00042	<p>心靈管理系列 - 壓力管理 單元二：積極及正向思維技巧 (一) Mind Management Series - Stress Management Module 2: Positive Thinking (1)</p> <p>日期：29.11.14 時間：12:15pm - 2:15pm 時數：2小時</p>	HK\$180	2	2 non-core	2	Management & Soft Skills
173I3	<p>瞭解你的保險客戶 (樓宇建築業) - 合約招標 Understanding Insurance Clients (Building Construction Industry) - Tendering of Contracts</p> <p>日期：29.11.14 時間：1:30pm - 6:30pm 時數：5小時</p>	# HK\$450	-	5 non-core	5	General Insurance
412B2	<p>股票圖表走勢分析 單元三：技術指標 - 移動平均線、MACD及相對強弱指數 Technical Analysis Module 3: Technical Indicators: Moving Averages, MACD and RSI</p> <p>日期：1.12.14 時間：2:00pm - 5:00pm 時數：3小時</p>	HK\$270	3	3 non-core	3	Investment & Financial Planning
452D2	<p>主要經濟指標與投資策劃 單元二：領先經濟指標 Key Economic Indicators and Investment Planning Module 2: Leading Economic Indicators</p> <p>日期：1.12.14 & 2.12.14 時間：6:30pm - 9:00pm 時數：5小時 (共2堂)</p>	HK\$450	5	5 non-core	5	Investment & Financial Planning
PE4200036	<p>投資策劃 (常犯投資錯誤) Investment Planning (Common Mistakes in Investing)</p> <p>日期：1.12.14 & 8.12.14 時間：6:30pm - 9:00pm 時數：5小時 (共2堂)</p>	中 HK\$450	5	5 non-core	5	Investment & Financial Planning
PE4200049	<p>金融專業人士管理技巧 (進階課程) 單元二：客服主管的教練技巧 Advanced Management Skills for Financial Professionals Module 2: Coaching Skills for Service Leaders</p> <p>日期：2.12.14 時間：1:00pm - 6:00pm 時數：5小時</p>	NEW HK\$450	5	5 non-core	5	Management & Soft Skills

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617F2	投資產品發展近況 單元二：股票市場 Current Development on Investment Products Module 2: Equity Market 日期：2.12.14 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Investment & Financial Planning
134I2	汽車保險條例 Motor Insurance Ordinance 日期：2.12.14 時間：1:15pm - 6:15pm 時數：5小時	HK\$450	-	5 non-core	5	Law & Compliance
PE420054	金融災難的教訓 Lessons from the Financial Disasters 日期：2.12.14 時間：2:30pm - 5:30pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills
268I2	保險業法規遵守 - 保險中介人的規管 Insurance Industry Regulatory Compliance - Regulation of Insurance Intermediaries 日期：2.12.14 & 9.12.14 時間：7:00pm - 9:30pm 時數：5小時（共2堂）	HK\$450	-	5 non-core	5	Law & Compliance
262I2	香港保險法例個案 Hong Kong Insurance Legal Cases 日期：3.12.14 時間：9:15am - 5:30pm 時數：7小時（12:45pm - 2:00pm午膳）	HK\$630	7	7 non-core	7	Law & Compliance
410B2	股票圖表走勢分析 單元一：基本圖表及形態分析 Technical Analysis Module 1: Basic Charting and Pattern Analysis 日期：3.12.14 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Investment & Financial Planning
446E2	醫療保險索償（保險中介人須知） Medical Insurance Claims for Insurance Intermediaries 日期：3.12.14 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	-	3 non-core	3	Life & Health Insurance
223C2	透視個性知己知彼 單元二：個性擴展 Managing Self and Relationship Through Enneagram Module 2: Personality Development 日期：3.12.14 時間：2:00pm - 6:00pm 時數：4 小時	HK\$360	4	4 non-core	4	Management & Soft Skills
SC-1760-09	創意增值（保險專業人士）研習坊 單元一：什麼是創意思維？ Creative Thinking Techniques for Business and Personal Enhancement (Insurance Professionals) Workshop Module 1: What is Creativity? 日期：3.12.14 時間：3:00pm - 5:00pm 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills

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EN English materials

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761F2	打擊洗黑錢及恐怖分子資金籌集（金融機構）條例和 相關監管課程要求 Anti-Money Laundering and Counter-Terrorist Financing (Financial Institutions) Ordinance and Relevant Regulatory Requirements 日期：3.12.14 時間：6:30pm - 8:30pm 時數：2小時	HK\$180	2	2 non-core	2	Law & Compliance
743F2	客戶投資心理解說 單元一：向內地富戶提供金融服務 Know Your Customers' Investment Psychology Module 1: Providing Financial Service to Wealthy Mainland Customers 日期：4.12.14 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills
764F2	處理金融糾紛的準備和進階技巧課程 單元二：調解過程 Advanced Skills in Handling Financial Disputes and Preparing for the FDRC Workshop Module 2: Processes of Mediation 日期：4.12.14 & 5.12.14 時間：6:30pm - 8:30pm 時數：4小時（共2堂）	HK\$440	4	4 non-core	4	General Insurance
274E2	資產保障相關法律 - 信托 Law Relating to Asset Protection - Trusts 日期：5.12.14 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Investment & Financial Planning
SC-2083-12	強化影響力課程 單元二：自我影響與激勵 Strengthening Your Influential Power Course Module 2: Influencing & Motivating Self 日期：5.12.14 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	3	3 non-core	3	General Insurance
224C2	透視個性知己知彼 單元三：提升人際關係 Managing Self and Relationship Through Enneagram Module 3: Improving Interpersonal Relationship 日期：5.12.14 時間：2:00pm - 6:00pm 時數：4 小時	 HK\$360	4	4 non-core	4	Management & Soft Skills
179E2	商業保險索償 Commercial Insurance Claims & Indemnity 日期：5.12.14 時間：6:30pm - 8:30 pm 時數：2小時	HK\$180	-	2 non-core	2	General Insurance
755F2	商業道德操守（金融業）單元三：商業道德的評估 Business Ethics in the Finance Sector Module 3: Evaluating Business Ethics 日期：6.12.14 時間：9:00am - 11:00am 時數：2小時	HK\$180	2	2 non-core	2	General Insurance
804E2	激勵人才與績效提升 Motivating People for Peak Performance 日期：6.12.14 時間：9:00am - 2:00pm 時數：5 小時	 HK\$450	5	5 non-core	5	Management & Soft Skills
SC-2062-11	說服技巧（金融服務業專才）單元三：認識有意識和潛意識說服法 Persuasion Skills for Financial Professionals Module 3: Influencing People Consciously and Subconsciously 日期：6.12.14 時間：9:00am - 2:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills

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825E2	投資策略系列 單元一：長線投資策略 Investment Strategies Series Module 1: Long Term Investment Strategies 日期：8.12.14 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Investment & Financial Planning
SC-2075-12	危機管理 - 恐懼感=危機感? 日期：8.12.14 時間：2:00pm - 5:00pm 時數：3小時	中 HK\$270	3	3 non-core	3	Management & Soft Skills
SC-2066-11	「身心語言程式學」工作坊 單元七：NLP排難解紛 Boost Your Work Competence with NLP Module 7: NLP Conflict Resolution 日期：8.12.14 時間：2:00pm - 6:00pm 時數：4小時	HK\$360	4	4 non-core	4	General Insurance
737F2	亞洲證券市場 單元二：亞洲金融危機及改革 Asian Securities Markets Module 2: Reforms after Financial Crisis 日期：8.12.14 時間：6:30pm - 8:30pm 時數：2小時	HK\$180	2	2 non-core	2	Investment & Financial Planning
PE4200016	強積金資訊重溫 and 更新 MPF Information Review & Updates Date: 8.12.14 Time: 6:30pm - 8:30pm Duration: 2 hours	EN HK\$285	2	2 core	2	MPF & Others
SC-1888-10	銷售奇才研習坊 (保險及投資專業人士) 單元二：銷售策略 Selling Genius Workshop (Insurance & Investment Professionals) Module 2: Selling Strategies 日期：9.12.14 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
413B2	股票圖表走勢分析 單元四：艾略特波浪理論 Technical Analysis Module 4: Elliott Wave Theory 日期：9.12.14 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Investment & Financial Planning
780E2	保險索償替代爭議解決方法 Alternative Insurance Dispute Resolution 日期：10.12.14 時間：9:30am - 12:30pm 時數：3小時	HK\$270	3	3 non-core	3	Law & Compliance
SC-1314-07	「身心語言程式學」工作坊 單元三：贏盡客心的NLP服務竅門 Boost Your Work Competence with NLP Module 3: Win the Heart of Your Customers by NLP Customer Service 日期：10.12.14 時間：1:00pm - 5:00pm 時數：4小時	HK\$360	4	4 non-core	4	Management & Soft Skills
842E2	醫療保險計劃 Medical Insurance Plans 日期：10.12.14 時間：3:30 pm - 5:30 pm 時數：2小時	HK\$180	-	2 non-core	2	Life & Health Insurance

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396E2	強積金最新發展 MPF Recent Development 日期：10.12.14 時間：6:30pm - 8:30pm 時數：2小時	HK\$285	2	2 core	2	MPF & Others
PBA00051	保險業非財務專業人士的會計及財務學 單元一：會計原理及概念 Accounting and Finance for Non-financial Professionals in Insurance Industry Module 1: Overview of Accounting Principles and Concepts 日期：11.12.14 時間：9:30am - 12:30pm 時數：3 小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
740F2	企業智庫個案課程（金融服務專業人士） 單元二：康宏理財 - 財務策劃管理改革 Trade Treasure Case-based Training Programme for Financial Service Professionals Module 2: Convoy Financial Holdings Limited - Management Reform in Financial Planning 日期：11.12.14 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	General Insurance
702E3	法律責任證書課程第二單元 - 佔用人責任及產品責任 Certificate Course in Legal Liability Part II - Occupier's Liability & Product Liability 日期：11.12.14 時間：1:15pm - 6:15pm 時數：5小時	HK\$450	5	5 non-core	5	Law & Compliance
220C1	提高優質顧客服務 Enhancing Quality Customer Services 日期：11.12.14 時間：1:30pm - 5:30pm 時數：4小時	HK\$360	4	4 non-core	4	Management & Soft Skills
PBA00052	保險業非財務專業人士的會計及財務學 單元二：企業績效評估 Accounting and Finance for Non-financial Professionals in Insurance Industry Module 2: Assessment of Business Performance 日期：11.12.14 時間：2:00pm - 5:00pm 時數：3 小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
396E2	強積金最新發展 MPF Recent Development 日期：11.12.14 時間：6:30pm - 8:30pm 時數：2小時	HK\$285	2	2 core	2	MPF & Others
PBA00053	保險業非財務專業人士的會計及財務學 單元三：投資資產 Accounting and Finance for Non-financial Professionals in Insurance Industry Module 3: Investment Assets 日期：11.12.14 時間：6:30pm - 9:30pm 時數：3 小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
SC-1761-09	創意增值（保險專業人士）研習坊 單元二：創意思維過程 Creative Thinking Techniques for Business and Personal Enhancement (Insurance Professionals) Workshop Module 2: The Innovation Process 日期：12.12.14 時間：1:00pm - 5:00pm 時數：4小時	HK\$360	4	4 non-core	4	Management & Soft Skills

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303E2	保險業客戶關係管理 - 創造忠實客戶 Creating Loyal Customers in Insurance Industry Through CRM 日期：12.12.14 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skill
705E3	法律責任證書課程 第五單元 - 董事及行政人員責任、專業責任 Certificate Course in Legal Liability Part V - Directors' & Officers' Liability, Professional Liability Date: 12.12.14 Time: 1:15pm - 6:15pm Duration: 5 hours	EN HK\$450	5	5 non-core	5	Law & Compliance
PBA00016	中國房地產投資策略 單元一：中國房地產發展 China Real Estate Investment Strategies Module 1: China Real Estate Development 日期：12.12.14 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
756F2	商業道德操守 (金融業) 單元四：管理商業道德的工具 I Business Ethics in the Finance Sector Module 4: Tools and Techniques to Manage Business Ethics I 日期：13.12.14 時間：9:00am - 12:00pm 時數：3小時	HK\$270	3	3 non-core	3	General Insurance
SC-2063-11	說服技巧 (金融服務業專才) 單元四：轉化為超卓的說服者 Persuasion Skills for Financial Professionals Module 4: Transform You to Become a Powerful Persuader 日期：13.12.14 時間：9:00am - 12:00pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills
806E2	團隊溝通及衝突管理 Building Team Communication & Resolving Conflict 日期：13.12.14 時間：9:00am - 2:00pm 時數：5 小時	中 HK\$450	5	5 non-core	5	Management & Soft Skills
757F2	商業道德操守 (金融業) 單元五：管理商業道德的工具II Business Ethics in the Finance Sector Module 5: Tools and Techniques to Manage Business Ethics II 日期：13.12.14 時間：12:15pm - 2:15pm 時數：2小時	HK\$180	2	2 non-core	2	General Insurance
286E3	瞭解建築險客戶 - 橋樑 Understanding Construction Insurance Clients - Bridges 日期：13.12.14 時間：1:30 pm - 6:30 pm 時數：5小時	# HK\$450	-	5 non-core	5	General Insurance
614F3	股市技術分析課程 單元四：裂口理論,葛蘭碧八大法則 Advanced Technical Analysis Module 4: Gap Theory, Granville Rules 日期：15.12.14 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Investment & Financial Planning

These programmes contain no contents on construction insurance.

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735E3	保險相關刑事法律 - 盜竊搶劫及入屋犯法 Criminal Law Relating To Insurance - Theft Robbery and Burglary 日期：15.12.14 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	-	3 non-core	3	General Insurance
749F2	內地金融制度入門 單元一：內地商業文化與政府管理機制 Understanding Mainland Financial System Module 1: Mainland Business Culture & Government Structure 日期：15.12.14 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	General Insurance
SC-1889-10	銷售奇才研習坊（保險及投資專業人士）單元三：銷售教練 Selling Genius Workshop (Insurance & Investment Professionals) Module 3: Sales Coaching 日期：16.12.14 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
814E2	個人績效登峰（保險及投資專才系列） 單元四：超脫平凡、創登峰業績 Transcend Your Personal Effectiveness (Insurance & Investment Professionals Series) Module 4: Transcend the Ordinary You, Excel the Highest Personal Effectiveness 日期：16.12.14 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
742F2	財務策劃（遺產繼承與承辦） Financial Planning (Estate Inheritance and Probate) 日期：16.12.14 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Investment & Financial Planning
618F2	投資產品發展近況 單元三：外匯及商品市場 Current Development on Investment Products Module 3: Forex/Currency and Commodity Market 日期：16.12.14 時間：2:00pm - 4:00pm 時數：2小時	HK\$180	2	2 non-core	2	Investment & Financial Planning
PE4200050	金融專業人士管理技巧（進階課程） 單元三：工作與生活共融的時間管理 Advanced Management Skills for Financial Professionals Module 3: Managing Time for Work-Life Integration 日期：16.12.14 時間：2:00pm - 5:00pm 時數：3小時	 HK\$270	3	3 non-core	3	Management & Soft Skills
744F2	客戶投資心理解說 單元二：投資心理 Know Your Customers' Investment Psychology Module 2: Understanding Investment Psychology 日期：16.12.14 時間：6:30pm - 8:30pm 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
732F2	互聯網世代的商機和人事（金融服務專業人員） 單元二：如何在互聯網時代的金融服務行業締造成功商機 Dealing with Business and People Successfully in the Internet Age (Financial Service Professionals) Module 2: How to Make Your Business More Successful in the Internet Age's Financial Service Industry 日期：17.12.14 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills

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SC-2084-12	強化影響力課程 單元三：影響與激勵團隊 Strengthening Your Influential Power Course Module 3: Influencing & Motivating Team 日期：17.12.14 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	3	3 non-core	3	General Insurance
445E2	醫療開支與保險市場 Medical Expenses and the Insurance Market 日期：17.12.14 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	-	3 non-core	3	Life & Health Insurance
400E2	加強對強積金中介人的規管 (1小時) Enhanced Regulation of MPF Intermediaries 日期：17.12.14 時間：6:30pm - 7:30pm 時數：1小時	❖ HK\$285	2	2 core	2	MPF & Others
401E2	強積金中介人的操守要求 (1小時) Conduct Requirements of MPF Intermediaries 日期：17.12.14 時間：7:30pm - 8:30pm 時數：1小時	❖				
PBA00020	變革管理技巧 單元二：項目管理 Essential Skills for Change Management Module 2: Project Management 日期：17.12.14 & 18.12.14 時間：6:30pm - 9:30pm 時數：6小時 (共2堂)	HK\$540	6	6 non-core	6	Management & Soft Skills
850E2	調解及替代爭議解決方法實務 Mediation & Alternative Dispute Resolution Practice 日期：17.12.14 時間：6:30pm - 9:30 pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills
PBA00054	保險業非財務專業人士的會計及財務學 單元四：遠期及期貨合約 Accounting and Finance for Non-financial Professionals in Insurance Industry Module 4: Forward and Futures Contracts 日期：18.12.14 時間：9:30am - 12:30pm 時數：3 小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
SC-2078-12	危機管理 - 避戰・備戰：自我認識及管理 日期：18.12.14 時間：10:00am - 1:00pm 時數：3小時	中 HK\$270	3	3 non-core	3	Management & Soft Skills
PBA00055	保險業非財務專業人士的會計及財務學 單元五：認股權證及期權 Accounting and Finance for Non-financial Professionals in Insurance Industry Module 5: Warrants and Options 日期：18.12.14 時間：2:00pm - 5:00pm 時數：3 小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
PBA00014	保險業有關妥善處理客戶個人資料指引 日期：18.12.14 時間：6:30pm - 8:30pm 時數：2小時	HK\$180	2	2 non-core	2	General Insurance

❖ The fee for any 1-hour module is \$170 per person. 參加其中1小時課程的學費為每位170元。

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SC-2069-11	銷售要訣 (財經專才系列) 單元二：12式銷售EQ Sales Essentials for Financial Professionals Module 2: 12 EQ Items of Selling 日期：18.12.14 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills
PBA00026	人民幣國際化和金融工具 單元一：人民幣國際化 Understanding RMB Internationalization and Financial Instruments Module 1: RMB Internationalization 日期：18.12.14 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
PBA00056	保險業非財務專業人士的會計及財務學 單元六：融資渠道 Accounting and Finance for Non-financial Professionals in Insurance Industry Module 6: Source of Finance 日期：18.12.14 時間：6:30pm - 9:30pm 時數：3 小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
821E2	投資產品發展近況 單元七：指數期權及潛在風險 Current Development on Investment Products Module 7: Index Options Trading and Its Risks 日期：18.12.14 & 19.12.14 時間：6:30pm - 9:30pm 時數：6小時 (共2堂)	HK\$540	6	6 non-core	6	Investment & Financial Planning
750F2	內地金融制度入門 單元二：內地外匯監管與操作規範I Understanding Mainland Financial System Module 2: Mainland Foreign Exchange System I 日期：20.12.14 時間：9:00am - 11:00am 時數：2小時	HK\$180	2	2 non-core	2	General Insurance
441E2	保險從業員須具備的醫學知識 - 危疾 Medical Knowledge for Insurance Practitioners- Critical Illness 日期：20.12.14 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	-	3 non-core	3	Life & Health Insurance
826E2	投資策略系列 單元二：順勢交易投資策略 Investment Strategies Series Module 2: Trend Following Investment Strategies 日期：22.12.14 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Investment & Financial Planning
613F3	股市技術分析課程 單元三：動向指標、順勢指標、隨機指標 Advanced Technical Analysis Module 3: Directional Movement Index (DMI), Commodity Channel Index (CCI), Stochastic Oscillator) 日期：22.12.14 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
813E2	個人績效登峰 (保險及投資專才系列) 單元三：自我掌控、向心魔說不 Transcend Your Personal Effectiveness (Insurance & Investment Professionals Series) Module 3: Master Personal Performance & Say Goodbye to Incongruence 日期：22.12.14 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills

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720F2	金融產品中介人實務須知 單元一：銷售金融產品的合規要求（重點重溫及最新修訂）I Best Practices for Financial Products Intermediaries Module 1: Sales Compliance Reviews and Updates I 日期：23.12.14 時間：1:00pm - 4:00pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills
394E2	“DISC” 性格創富（保險專業人士）學習坊 單元三：DISC分析工具和技巧 DISC Profiling for Business and Personal Enhancement (Insurance Professionals) Workshop Module 3: DISC Profiling Tools and Techniques 日期：23.12.14 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
721F2	金融產品中介人實務須知 單元二：銷售金融產品的合規要求（重點重溫及最新修訂）II Best Practices for Financial Products Intermediaries Module 2: Sales Compliance Reviews and Updates II 日期：23.12.14 時間：4:15pm - 6:15pm 時數：2小時	HK\$180	2	2 non-core	2	Law & Compliance
607F2	保險從業員的行業分析與股票投資系列 單元二：地產股 Industry Analysis and Stock Investment Series for Insurance Practitioners Module 2: Properties and Construction 日期：23.12.14 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
747E2	旅遊保險（財產） Travel Insurance (Property) 日期：23.12.14 時間：6:45pm - 9:45pm 時數：3小時	中 HK\$270	-	3 non-core	3	General Insurance
PBA00057	保險業非財務專業人士的會計及財務學 單元七：資金投資技巧 Accounting and Finance for Non-financial Professionals in Insurance Industry Module 7: Capital Investment Techniques 日期：23.12.14 時間：6:45pm - 9:45pm 時數：3 小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
PE4200032	保險從業員須具備的醫學知識 - 病史申報 Medical Knowledge for Insurance Practitioners - Medical Examinee's Disclosure 日期：24.12.14 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	-	3 non-core	3	Life & Health Insurance
PBA00043	心靈管理系列 - 壓力管理 單元三：積極及正向思維技巧（二） Mind Management Series - Stress Management Module 3: Positive Thinking (2) 日期：27.12.14 時間：9:00am - 12:00pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills

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PBA00044	心靈管理系列 - 壓力管理 單元四：提升抗逆能力減壓法（助人） Mind Management Series - Stress Management Module 4: Stress Reduction Techniques (Helping Others) 日期：27.12.14 時間：12:15pm - 2:15pm 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
225C2	透視個性知己知彼 單元四：提升工作表現 Managing Self and Relationship Through Enneagram Module 4: Application of Enneagram at Work 日期：29.12.14 時間：2:00pm - 6:00pm 時數：4 小時	中 HK\$360	4	4 non-core	4	Management & Soft Skills
SC-2064-11	「身心語言程式學」工作坊 單元五：NLP成功藝術 Boost Your Work Competence with NLP Module 5: The Art of Success with NLP 日期：29.12.14 時間：3:00pm - 5:00pm 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
PBA00017	中國房地產投資策略 單元二：中國房地產市場分析 China Real Estate Investment Strategies Module 2: Analyzing China Real Estate Market 日期：29.12.14 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
861E2	使用電腦及互聯網可能引致的法律責任 Liabilities Arising from Use of Computers and Internet Activities 日期：29.12.14 & 5.1.15 時間：6:30pm - 9:00pm 時數：5小時（共2堂）	HK\$450	-	5 non-core	5	General Insurance
SC-2085-12	強化影響力課程 單元四：3Q影響策略 Strengthening Your Influential Power Course Module 4: 3Q Influential Strategy 日期：30.12.14 時間：2:00pm - 6:00pm 時數：4小時	HK\$360	4	4 non-core	4	General Insurance
PE4200016	強積金資訊重溫和更新 MPF Information Review & Updates 日期：30.12.14 時間：6:30pm - 8:30pm 時數：2小時	HK\$285	2	2 core	2	MPF & Others
PBA00027	人民幣國際化和金融工具 單元二：人民幣債券 Understanding RMB Internationalization and Financial Instruments Module 2: RMB Bonds 日期：30.12.14 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
PBA00058	保險業非財務專業人士的會計及財務學 單元八：風險與回報 Accounting and Finance for Non-financial Professionals in Insurance Industry Module 8: Risk and Return 日期：30.12.14 時間：6:45pm - 9:45pm 時數：3 小時	HK\$270	3	3 non-core	3	Investment & Financial Planning

中 中文教材 Chinese materials

Code 編號	Programme Information 課程資料	Fee 費用	SFC CPT credits 證監會CPT	MPFA CPD credits 積金局CPD	IA CPD hours 保監處CPD	Category 類別
PE4200033	保險從業員須具備的醫學知識 - 體檢報告 Medical Knowledge for Insurance Practitioners - Medical Examiner's Report 日期：31.12.14 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	-	3 non-core	3	Life & Health Insurance
PBA00023	社交媒體和雲端競爭優勢 (金融專才) 單元二 Social Media Marketing and Cloud Competitive Advantages for Financial Professionals Module 2 日期：31.12.14 時間：5:30pm - 9:30pm 時數：4小時	HK\$360	4	4 non-core	4	General Insurance
296E2	商務人際網絡的建立 - 保險從業員工作坊 單元三：卓越感染力與人際網絡技巧 Business Networking Workshop for Insurance Practitioners Module 3: An Introduction to Influencing Skills for Networking 日期：2.1.15 時間：1:00pm - 5:00pm 時數：4小時	HK\$360	4	4 non-core	4	Management & Soft Skills
741F2	企業智庫個案課程 (金融服務專業人士) 單元三：康泰旅遊 - 以關心贏客心 Trade Treasure Case-based Training Programme for Financial Service Professionals Module 3: Hong Tai Travel - Touching Customers' Hearts with Genuine Care 日期：2.1.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
298E2	資產保障相關法律 - 信托以外的安排 Law Relating to Asset Protection - Non-Trust Arrangements 日期：2.1.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Investment & Financial Planning
758F2	商業道德操守 (金融業) 單元六：金融業相關的商業道德I Business Ethics in the Finance Sector Module 6: Business Ethics Issues in Connection with the Finance Sector I 日期：3.1.15 時間：9:00am - 11:00am 時數：2小時	HK\$180	2	2 non-core	2	General Insurance
751F2	內地金融制度入門 單元三：內地外匯監管與操作規範II Understanding Mainland Financial System Module 3: Mainland Foreign Exchange System II 日期：3.1.15 時間：9:00am - 11:00am 時數：2小時	HK\$180	2	2 non-core	2	General Insurance
759F2	商業道德操守 (金融業) 單元七：金融業相關的商業道德II Business Ethics in the Finance Sector Module 7: Business Ethics Issues in Connection with the Finance Sector II 日期：3.1.15 時間：11:15am - 1:15pm 時數：2小時	HK\$180	2	2 non-core	2	General Insurance
287E3	瞭解建築險客戶 - 特殊危險 Understanding Construction Insurance Clients - Special Hazards 日期：3.1.15 時間：1:30pm - 6:30pm 時數：5小時	# HK\$450	-	5 non-core	5	General Insurance

These programmes contain no contents on construction insurance.


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624F2	商品投資系列 單元二：原油 Investing in Commodities Series Module 2: Crude Oil 日期：5.1.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Investment & Financial Planning
SC-2065-11	「身心語言程式學」工作坊 單元六：銷售演說技巧 Boost Your Work Competence with NLP Module 6: Professional Sales Presentation 日期：5.1.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	General Insurance
619F2	投資產品發展近況 單元四：結構性投資產品 Current Development on Investment Products Module 4: Structured Investment Products 日期：5.1.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
PBA00024	社交媒體和雲端競爭優勢（金融專才）單元三 Social Media Marketing and Cloud Competitive Advantages for Financial Professionals Module 3 日期：6.1.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	General Insurance
SC-2070-11	銷售要訣（財經專才系列）單元三：Y世代銷售團隊 Sales Essentials for Financial Professionals Module 3: Gen Y Sales Team 日期：6.1.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills
608F2	保險從業員的行業分析與股票投資系列 單元三：消費股 Industry Analysis and Stock Investment Series for Insurance Practitioners Module 3: Consumer Goods 日期：6.1.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
724F2	金融產品中介人實務須知 單元五：逆境中的投資 / 保險客戶情緒管理I Best Practices for Financial Products Intermediaries Module 5: Surviving the Financial Crisis with Investment / Insurance Customers I 日期：7.1.15 時間：10:00am - 1:00pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills
445E2	醫療開支與保險市場 Medical Expenses and the Insurance Market 日期：7.1.15 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	-	3 non-core	3	Life & Health Insurance
725F2	金融產品中介人實務須知 單元六：逆境中的投資 / 保險客戶情緒管理II Best Practices for Financial Products Intermediaries Module 6: Surviving the Financial Crisis with Investment / Insurance Customers II 日期：7.1.15 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills

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822E2	投資產品發展近況 單元八：為客戶揀選基金組合 Current Development on Investment Products Module 8: Funds Selection for Your Customers 日期：7.1.15 & 8.1.15 時間：6:30pm - 8:30pm 時數：4小時（共2堂）	HK\$360	4	4 non-core	4	Investment & Financial Planning
395E2	“DISC” 性格創富（保險專業人士）學習坊 單元四：DISC在保險及投資銷售的應用 DISC Profiling for Business and Personal Enhancement (Insurance Professionals) Workshop Module 4. DISC Selling Skills 日期：8.1.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
746E2	旅遊保險（人身） Travel Insurance (Person) 日期：8.1.15 時間：6:45pm - 9:45pm 時數：3小時	 HK\$270	-	3 non-core	3	General Insurance
SC-1762-09	創意增值（保險專業人士）研習坊 單元三：創意思維工具及技巧 Creative Thinking Techniques for Business and Personal Enhancement (Insurance Professionals) Workshop Module 3: Creative Thinking Tools and Techniques 日期：9.1.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
PBA00045	心靈管理系列 - 壓力管理 單元五：提升抗逆能力減壓法（自助） Mind Management Series - Stress Management Module 5: Stress Reduction Techniques (Self-helping) 日期：10.1.15 時間：9:00am - 11:00am 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
PBA00046	心靈管理系列 - 壓力管理 單元六：克服恐懼減壓技巧 Mind Management Series - Stress Management Module 6: Overcoming Anxiety and Depression 日期：10.1.15 時間：11:15am - 1:15pm 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
625F2	商品投資系列 單元三：有色金屬 Investing in Commodities Series Module 3: Base (Nonferrous) Metals 日期：12.1.15 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
728E2	「不言而喻」的奧妙 - 保險從業員工作坊 單元三：非語言溝通技巧2 - 身體語言解碼 Communicating without Talking for Insurance Practitioners Module 3: Non-verbal Communication Skills II 日期：12.1.15 時間：6:30pm - 8:30pm 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
272I1	保險相關普通法原則 Common Law Principles of Insurance 日期：12.1.15 & 19.1.15 時間：6:30pm - 9:00pm 時數：5小時（共2堂）	HK\$450	-	5 non-core	5	General Insurance

 中文教材 Chinese materials

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626F2	商品投資系列 單元四：軟商品 Investing in Commodities Series Module 4: Soft Commodities 日期：12.1.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
SC-1890-10	銷售奇才研習坊（保險及投資專業人士）單元四：銷售奇才 Selling Genius Workshop (Insurance & Investment Professionals) Module 4: Selling Genius 日期：13.1.15 時間：1:00pm - 5:00pm 時數：4小時	HK\$360	4	4 non-core	4	Management & Soft Skills
623F2	商品投資系列 單元一：黃金 Investing in Commodities Series Module 1: Investing in Gold 日期：13.1.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Investment & Financial Planning
PE4200056	The Long Term Insurance Market  PIBA CPD*  Date: 13.1.15 Time: 2:15pm - 5:15pm Duration: 3 hours	HK\$270	-	3 non-core	3	Life & Health Insurance
PBA00025	社交媒體和雲端競爭優勢（金融專才）單元四 Social Media Marketing and Cloud Competitive Advantages for Financial Professionals Module 4 日期：13.1.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	General Insurance
733F2	互聯網世代的商機和人事（金融服務專業人員） 單元三：在互聯網時代的金融服務行業的Y世代人士 Dealing with Business and People Successfully in the Internet Age (Financial Service Professionals) Module 3: Gen Y'ers in the Internet Age's Financial Service Industry 日期：14.1.15 時間：1:00pm - 5:00pm 時數：4小時	HK\$360	4	4 non-core	4	Management & Soft Skills
446E2	醫療保險索償（保險中介人須知） Medical Insurance Claims for Insurance Intermediaries 日期：14.1.15 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	-	3 non-core	3	Life & Health Insurance
453D2	主要經濟指標與投資策劃 單元三：同步經濟指標及滯後經濟指標 Key Economic Indicators and Investment Planning Module 3: Coincident and Lagging Economic Indicators 日期：14.1.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
782E2	僱員補償理賠沿革 Historical Claims Development of Employees' Compensation 日期：14.1.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	-	3 non-core	3	General Insurance

* These courses are co-organized with Professional Insurance Brokers Association (PIBA) and will be recognized as IA - CPD credits. Members of PIBA can directly enroll via PIBA to obtain member discounts.

 Taught in English

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PBA00018	中國房地產投資策略 單元三：中國房地產投資 China Real Estate Investment Strategies Module 3: China Real Estate Investments 日期：14.1.15 & 15.1.15 時間：6:30pm - 9:30pm 時數：6小時（共2堂）	HK\$540	6	6 non-core	6	Investment & Financial Planning
729E2	「不言而喻」的奧妙 - 保險從業員工作坊 單元四：非語言溝通技巧3 - 外觀禮儀 Communicating without Talking Module 4: Non-verbal Communication Skills III 日期：15.1.15 時間：6:30pm - 8:30pm 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
745F2	客戶投資心理理解說 單元三：與客戶共渡經濟危與機 Know Your Customers' Investment Psychology Module 3: Getting Through Economic Ups & Downs with Customers 日期：15.1.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills
765F2	處理金融糾紛的準備和進階技巧課程 單元三：如何運用調解技巧以解決金融糾紛 Advanced Skills in Handling Financial Disputes and Preparing for the FDRC Workshop Module 3: How to Use Mediation Skills to Resolve Financial Disputes? 日期：15.1.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$330	3	3 non-core	3	General Insurance
708I3	受信人責任 - 代理人、受托人及董事 Duties of Fiduciaries - Agents, Trustees and Directors 日期：15.1.15 & 22.1.15 時間：6:30pm - 9:00pm 時數：5小時（共2堂）	HK\$450	5	5 non-core	5	General Insurance
260I2	僱員補償條例 Employees' Compensation Ordinance 日期：16.1.15 時間：9:15am - 5:30 pm 時數：7小時（12:45-2:00 午膳）	HK\$630	7	7 non-core	7	Law & Compliance
SC-1763-09	創意增值（保險專業人士）研習坊 單元四：創意銷售技巧 Creative Thinking Techniques for Business and personal Enhancement (Insurance Professionals) Workshop Module 4: Creative Selling Skills 日期：16.1.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
761F2	打擊洗黑錢及恐怖分子資金籌集（金融機構）條例和 相關監管課程要求 Anti-Money Laundering and Counter-Terrorist Financing (Financial Institutions) Ordinance and Relevant Regulatory Requirements 日期：16.1.15 時間：6:30pm - 8:30pm 時數：2小時	HK\$180	2	2 non-core	2	Law & Compliance
752F2	內地金融制度入門 單元四：內地稅務制度 Understanding Mainland Financial System Module 4: Fundamental PRC Taxation Regime 日期：17.1.15 時間：9:00am - 12:00pm 時數：3小時	HK\$270	3	3 non-core	3	General Insurance

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288E3	瞭解建築險客戶 - 多層高樓 Understanding Construction Insurance Clients - High-rise Buildings 日期：17.1.15 時間：1:30pm - 6:30pm 時數：5小時	HK\$450	-	5 non-core	5	General Insurance
620F2	投資產品發展近況 單元五：衍生產品 Current Development on Investment Products Module 5: Derivatives 日期：19.1.15 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
PBA00021	變革管理技巧 單元三：持分者管理 Essential Skills for Change Management Module 3: Stakeholder Management 日期：19.1.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills
734F2	互聯網世代的商機和人事（金融服務專業人員） 單元四：如何與Y世代人士一起在互聯網時代的金融服務行業創富 Dealing with Business and People Successfully in the Internet Age (Financial Service Professionals) Module 4: Ways to Wealth with Gen Y'ers in the Internet Age's Financial Service Industry 日期：21.1.15 時間：1:00pm - 5:00pm 時數：4小時	HK\$360	4	4 non-core	4	Management & Soft Skills
SC-2071-11	銷售要訣（財經專才系列） 單元四：Meta - Coaching教練式銷售和管理 Sales Essentials for Financial Professionals Module 4: Meta-Coaching Sales and Management Skills 日期：21.1.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
842E2	醫療保險計劃 Medical Insurance Plans 日期：21.1.15 時間：3:30pm - 5:30pm 時數：2小時	HK\$180	-	2 non-core	2	Life & Health Insurance
760F2	內地金融制度入門 單元五：內地宏觀經濟及理財策劃概況 Understanding Mainland Financial System Module 5: Mainland Macroeconomic and Financial Planning Overview 日期：21.1.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	General Insurance
722F2	金融產品中介人實務須知 單元三：市場慣例及客戶合適程度管理I Best Practices for Financial Products Intermediaries Module 3: Market Practices and Customer Suitability Management I 日期：22.1.15 時間：1:00pm - 4:00pm 時數：3小時	HK\$270	3	3 non-core	3	Law & Compliance
723F2	金融產品中介人實務須知 單元四：市場慣例及客戶合適程度管理II Best Practices for Financial Products Intermediaries Module 4: Market Practices and Customer Suitability Management II 日期：22.1.15 時間：4:15pm - 6:15pm 時數：2小時	HK\$180	2	2 non-core	2	Law & Compliance

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609F2	保險從業員的行業分析與股票投資系列 單元四：基建股 Industry Analysis and Stock Investment Series for Insurance Practitioners Module 4: Infrastructure 日期：22.1.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
818E2	風險評估及管理（財經業人士） 單元四：從財務報表中分析風險的技巧II Risk Assessment and Management for Financial Service Executives Module 4: Techniques of Reading Risks from Financial Statements II 日期：22.1.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
269I2	保險業法規遵守 - 保險中介人須知的法庭個案 Insurance Industry Regulatory Compliance - Court Cases for Insurance Intermediaries 日期：22.1.15 & 23.1.15 時間：7:00pm - 9:30pm 時數：5小時（共2堂）	HK\$450	-	5 non-core	5	Law & Compliance
SC-2086-12	強化影響力課程 單元五：引領變革 Strengthening Your Influential Power Course Module 5: Leading Change 日期：23.1.15 時間：2:00pm - 6:00pm 時數：4小時	HK\$360	4	4 non-core	4	Management & Soft Skills
PBA00047	心靈管理系列 - 壓力管理 單元七：平息客戶情緒技巧 Mind Management Series - Stress Management Module 7: Handling Customers' Emotions 日期：24.1.15 時間：9:30am - 11:30am 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
819E2	風險評估及管理（財經業人士） 單元五：財經市場的風險管理 Risk Assessment and Management for Financial Service Executives Module 5: Risk Management in Financial Market 日期：26.1.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
454D2	主要經濟指標與投資策劃 單元四：重要市場的經濟指標分析及經濟指標之限制 Key Economic Indicators and Investment Planning Module 4: Analysis of Economic Indicators of Major Markets and Limitation of Economic Indicators 日期：26.1.15 & 27.1.15 時間：6:30pm - 8:30pm 時數：4小時（共2堂）	HK\$360	4	4 non-core	4	Investment & Financial Planning
SC-2067-11	「身心語言程式學」工作坊 單元八：處理刁難客戶 Boost Your Work Competence with NLP Module 8: Handling Difficult Customers 日期：27.1.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
PE4200016	強積金資訊重溫和更新 MPF Information Review & Updates 日期：27.1.15 時間：6:30pm - 8:30pm 時數：2小時	HK\$285	2	2 core	2	MPF & Others

Code 編號	Programme Information 課程資料	Fee 費用	SFC CPT credits 證監會CPT	MPFA CPD credits 積金局CPD	IA CPD hours 保監處CPD	Category 類別
SC-1315-07	「身心語言程式學」工作坊 單元四：NLP的成功銷售學 Boost Your Work Competence with NLP Module 4: NLP Selling Techniques for Insurance Practitioners 日期：28.1.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
441E2	保險從業員須具備的醫學知識 - 危疾 Medical Knowledge for Insurance Practitioners- Critical Illness 日期：28.1.15 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	-	3 non-core	3	Life & Health Insurance
738F2	亞洲證券市場 單元三 - 另類投資與傳統投資及東西方證券市場的差異 Asian Securities Markets Module 3: Alternative Investments & Difference Between Western / Eastern Securities Markets 日期：28.1.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
PBA00028	人民幣國際化和金融工具 單元三：人民幣投資基金與其他金融產品 Understanding RMB Internationalization and Financial Instruments Module 3:RMB Investment Funds and Other Financial Products 日期：28.1.15 & 29.1.15 時間：6:30pm - 9:00pm 時數：5小時（共2堂）	HK\$450	5	5 non-core	5	General Insurance
297E2	商務人際網絡的建立 - 保險從業員工作坊 單元四：你的人際網絡成功大計 Business Networking Workshop for Insurance Practitioners Module 4: Action Plan for Personal Development Specific to Networking 日期：29.1.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
273I2	中港保險法比較 A Comparison of Insurance Law between China & Hong Kong 日期：29.1.15 時間：1:15pm - 6:15pm 時數：5小時	中 HK\$450	5	5 non-core	5	Law & Compliance
748E2	旅遊保險（經濟權益） Travel Insurance (Pecuniary Interests) 日期：29.1.15 時間：6:45pm - 9:45pm 時數：3小時	中 HK\$270	-	3 non-core	3	General Insurance
396E2	強積金最新發展 MPF Recent Development 日期：30.1.15 時間：6:30pm - 8:30pm 時數：2小時	HK\$285	2	2 core	2	MPF & Others

Programme Administration Guidelines 課程管理指引

Enrollment 課程報名

Please use the specified enrollment form and follow the “Notes for Applicants” in the form to apply for programmes.

All places are allocated on a first-come-first-served basis. Incomplete forms and forms received without payment will not be processed.

請使用指定的報名表格並按照表格內的“報名須知”報讀課程。

所有課程名額均以先到先得方法分配，任何未填妥之表格，或未繳交學費，本院將不會處理。

Deadline for Application 截止報名日期

The deadline for application is 7 working days (Exclusive of Saturdays) prior to the class commencement date. (The enrollment deadline might be subject to change depending on the enrollment status).

截止報名日期為每班開課前七個工作天（不包括星期六）。（截止報名日期或會因應收生情況而有所更改）。

Notification of Class Commencement 開課通知

Successful applicants will be notified of the class information by the contact method specified on the enrollment form at least 3 working days before class commencement. PEAK will not be responsible for the loss of class notification sent by mail. Please contact us at 2836 1906 if you do not receive the notification before the class commencement.

凡成功申請者將於開課前至少三個工作天接獲本院以閣下指定的聯絡方法通知開課詳情。本院對因郵遞失誤而寄失的開課通知書，概不負責。如在開課前尚未接獲通知，申請者可致電本院查詢查詢（電話：2836 1906）。

Programme Fees/Receipt 學費/收據

For a programme commencing within 7 working days at the time of enrollment, trainees are required to settle the programme fee by cash.

Programme fees paid are non-refundable, except for cases of unsuccessful applications and programme cancellation or rescheduling. Fees paid and places enrolled are also not transferable, and request for programme swapping will not be entertained.

Trainees will sign and collect the receipt at the first lesson. Fees paid after the enrollment deadline may result in delay in receipt issuing. For those who have not collected the receipts at the first lesson, our staff will contact them for picking up / mailing arrangement. PEAK will not be responsible for any loss in mailing. Trainees will be required to pay an administrative charge of HK\$100 for their request for each additional receipt copy. Please send crossed cheque payable to “Vocational Training Council” with a written application attention to “The Programme Team” of the Institute. For enquiry, please contact us at 2836 1862.

如報讀之課程將在報名當日起計7個工作天內開課，必須以現金繳交學費。

除學員之申請不獲接納或所選課程取消/改期外，所有已繳學費恕不退還。學費及學額亦不可作任何更改（包括不可轉班）或轉讓他人。

學員需於第一堂簽收收據，若學員於報名截止日後繳費，收據將會稍遲發出。本院會通知未簽收收據之學員前來領取收據或將收據郵寄予學員。本院對郵遞失誤概不負責。學員如要求本院發出收據副本證明，需以書面通知本院課程組，並需繳付港幣100元手續費。收據重發申請須以支票付款，抬頭為“職業訓練局”。查詢請致電2836 1862。

Class Venue 上課地點

Unless otherwise specified, all classes will be held at VTC Tower, 27 Wood Road, Wanchai, Hong Kong. Please refer to the venue directory at the PEAK office before attending class, or call us at 2836 1922 for enquiry.

除特別指示外，所有課堂均在香港灣仔活道27號職業訓練局大樓舉行。學員可於上課前到本院辦事處查看課室編排表，或致電2836 1922向本院查詢。

Medium of Instruction 授課語言

Except language programmes, programmes specified to be conducted in English, and degree programmes, all classes are conducted in Cantonese and supplemented with English terminology. Programme handouts will be provided in Chinese or English.

除語文、一些指定以英語講授課程及學位課程外，所有課程均以廣東話授課，部份輔以英文專業用語，講義為英文或中文。

Attendance-Taking Procedures 點名程序

Trainees are required to take attendance at the Reception Counter of PEAK or venue specified in the class confirmation letter for the first lesson. For the remaining lessons, attendance will be taken in the classroom. Taking attendance for another trainee is not allowed. If found, the Institute has the right to terminate the study of such trainee and the fees paid will not be refunded. **For financial CPD/CPT programmes, the CPD/CPT credits of trainees who are late for class will be deducted on a pro-rata basis.** PEAK has the right to ask the trainees to present the HKID card for identity verification purpose. In particular, CPD Trainees should read the “CPD Programme – Notes to Trainees” carefully.

學員需於第一堂到報名處或開課通知書上列明之地點點名，第一堂之後則在課室內點名。學員不可代他人點名，如被發現，本院有權終止該學員之學籍，所繳款項亦概不發還。凡報讀持續專業發展課程(CPD/CPT課程)而遲到之學員，其CPD/CPT分數將按比例扣減。本院有權要求學員出示身份證以核實身份。此外，持續專業發展課程之學員亦應特別注意及遵守指引內的「持續專業發展課程 – 學員須知」。

CPD Programme - Notes to Trainees 「持續專業發展課程 - 學員須知」

1. Trainees of Continuing Professional Development (CPD) / Continuing Professional Training (CPT) programmes are required to sign in and out on the attendance sheet for every single class. CPD/CPT credits will be given to trainees according to the attendance record. Trainees who have not signed in and/or out on the attendance sheet for a particular class will be deemed to have been absent from that class.
凡參加持續專業發展 (CPD/CPT) 課程之學員，請緊記於每一課堂上課前及每一課堂完結時在點名簿上簽名，以便計算CPD/CPT分數。學員若未有按上述指示於點名簿上簽名，將一律被當作缺席處理。
2. Trainees who are late for a CPD/CPT class should go to PEAK's Reception Counter at **9/F VTC Tower** or to the Registration Desk right outside the classroom (where applicable) to sign on the attendance sheet. **The CPD/CPT credits of trainees who are late for class will be deducted on a pro-rata basis.**
學員若因事遲到，請立即前往本大樓9樓「高峰進修學院」報名處或向班房門外當值同事（如適用）簽到。請注意，本院將按學員遲到的時間扣減CPD/CPT分數。
3. CPD/CPT credits for trainees will be calculated on a pro-rata basis according to the attendance record. Please note that the minimum unit of CPD/CPT credit is 0.5. Hence, for trainees who are late for class or leave before the class ends, even for less than 30 minutes, a minimum of 0.5 credit will be deducted.
學員可獲的CPD/CPT分數將根據出席課堂的時數按比例計算。有關分數的最少單位為0.5分，遲到或早退不足半小時亦作半小時計算。
4. Trainees will not be given any MPFA and SFC credits if they are late or absent from the class for MORE than the specified time as given in the following table.
學員若遲到或缺席超過下列時數，將不能獲得任何MPFA及SFC分數。

Duration of Programme (Hours) 課程時數	No MPFA and SFC credits will be given if Trainees are late or absent from class for more than the specified time below 若遲到或缺席超過下列時數，將不能獲得任何MPFA及SFC分數
2	15 minutes / 15 分鐘
3	30 minutes / 30 分鐘
4	30 minutes* / 30 分鐘*
5	1 hour* / 1 小時*
6	1 hour* / 1 小時*
7	1 hour* / 1 小時*
10	2 hour* / 2 小時*

*Note: For programmes which comprise 2 lessons, MPFA & SFC credits will be given based on the total duration of the programme that trainees have attended.

*註：若有關課程分兩節課堂舉行，本院將按學員於兩節課堂的總缺席時數計算MPFA及SFC時數。

5. CPD/CPT credits of any trainee will be deducted on a pro-rata basis if he/she leaves the classroom for more than 10 minutes.
若學員在上課期間離開課室超過10分鐘，CPD/CPT分數將按比例被扣減。
6. Trainees **will not be given any CPD credits** of the Law Society of Hong Kong if they are **absent or late for more than 10 minutes** for a programme of less than 3 hours in duration.
若學員遲到或離席10分鐘或以上，而課堂時數少於三小時，他們將不可獲取香港律師會的持續專業發展時數。
7. **Trainees should refer to the digital clock displayed at PEAK for signing in and signing out purpose.**
本院將以院內的時鐘所顯示之時間記錄學員出席時數。
8. No eating or drinking is allowed in classrooms.
課室內不准飲食。

Certificate 證書頒發

Trainees of short programmes with over 80%* attendance will be issued an Attendance Certificate. Normally, certificate will be distributed to trainees at the end of the class. However, the certificate will not be ready at the end of the class in the following cases:

- Trainees enroll in a programme in less than 3 working days (excluding Saturdays and Sundays) before the class commencement date; and/or
- **Trainees are late for or absent from (including leaving the class before it ends) financial CPD/CPT programmes for more than 10 minutes**

For the cases mentioned above, the certificate will be issued within 7 working days after the end of the programme and our staff will contact respective trainees for picking up/mailing arrangement. PEAK will not be responsible for any loss in mailing. Trainees will be required to pay an administrative charge of HK\$100 and with a written application to "The Programme Team" of the Institute. If payment is made by cheque, a crossed cheque payable to "Vocational Training Council" should be sent to PEAK. For enquiry, please contact us at 2836 1825.

* Programmes may have different attendance requirements. Please refer to the programme brochures.

出席率超過80%*的短期課程學員將獲發出席證書。證書一般可於課程完結當天派發，但在以下情況下，證書將未能於課程完結當日發給學員：

- 學員於開課日前少於3個工作天（不包括星期六及日）報名；及/或
- 學員於持續專業培訓課程（CPD/CPT課程）的課堂遲到、早退或中途離席超過十分鐘

在上述情況，本院會於課程完結後7個工作天內發出證書，並會通知學員前來領取或選擇以郵寄方式收取。本院對郵遞失誤概不負責。如學員因遺失證書而需本院補發，需以書面通知本院課程組，並需繳付港幣100元手續費。如以支票付款，請將支票遞交至高峰進修學院，支票抬頭為“職業訓練局”。查詢請致電2836 1825。

*個別課程會有不同的出席要求，請詳閱相關課程單張。

Student Handbook for PEAK's Professional Diploma/Professional Certificate Programmes 專業文憑及專業證書課程學生手冊

A Student Handbook for PEAK's Professional Diploma (PD) and Professional Certificate (PC) programmes is available for download from PEAK Website (www.peak.edu.hk) under "Programmes>Admission>Class Regulations". All PD/PC students (including students who enroll in individual modules) must read the Student Handbook carefully and comply with the guidelines stipulated in the Handbook. If any student needs a hard copy of the Handbook, please contact at 2836 1922 during office hours.

本院之專業文憑及專業證書課程學生手冊已上載於網頁(www.peak.edu.hk)，學員可到網頁(位置：「學院課程」>「報名」>「課室規則」)下載學生手冊。所有於本院就讀專業文憑或專業證書課程(包括報讀個別單元課程)的學生均須閱讀及遵守學生手冊內的指引。如有學員需要學生手冊列印本，可於辦公時間內致電2836 1922。

Class/ Examination** Arrangement in Times of Typhoons and Rainstorms 颱風及暴雨期間之課堂 / 考試**安排

Typhoons When typhoons (also refer to tropical cyclones) affect Hong Kong, the following arrangements for classes/examinations** of the Institute of Professional Education And Knowledge (PEAK) will apply:

颱風 颱風襲港期間，高峰進修學院課堂 / 考試** 安排大致如下：

Typhoon Signal 颱風信號	Action to be taken (PEAK Classes/Examinations**) 安排事宜 (高峰進修學院課堂 / 考試**)
No. 1 一號颱風信號	Classes/Examinations** conducted as scheduled (unless specified by PEAK/VTC otherwise) 課堂 / 考試**如期進行 (除非之前高峰進修學院/職訓局另有宣佈)
No. 3 三號颱風信號	Classes/Examinations** conducted as scheduled (unless specified by PEAK/VTC otherwise) 課堂 / 考試**如期進行 (除非之前高峰進修學院/職訓局另有宣佈)
Pre-No.8 Special Announcement#/ Typhoon Signal No. 8 or above 八號預警# / 八號或以上颱風信號	(a) Issued or in force at 6:15 am or before 11:00 am 上午六時十五分至十一時前發出或仍然生效 PEAK classes/examinations** scheduled to commence within 9:00 am – 12:00 noon 上午九時至正午十二時開始上課之高峰進修學院課堂 / 考試** Cancelled 取消
	(b) Issued or in force at 11:00 am or before 4:00 pm 上午十一時至下午四時前發出或仍然生效 PEAK classes/examinations** scheduled to commence within 12:00 noon – 6:00 pm 正午十二時至下午六時開始上課之高峰進修學院課堂 / 考試** Cancelled 取消
	(c) Issued or in force at 4:00 pm or thereafter 下午四時或以後發出或仍然生效 PEAK classes/examinations** scheduled to commence within 6:00 pm – 10:00 pm 晚上六時至十時開始上課之高峰進修學院課堂 / 考試** Cancelled 取消
	(d) Issued when classes/examinations** are in session 上課 / 考試**期間懸掛 All classes/examinations** will be immediately suspended for the session. 即時終止在該時段進行的課堂 / 考試**
	(e) Issued before start of examinations** 考試**開始前懸掛 Examinations** to be held in that particular session should be postponed . 在該時段舉行的考試**將會延期
Lowering to Typhoon signal No. 3 or below or lowering all typhoon signals at any time 改掛三號或以下颱風信號或除下所有颱風信號	All classes/examinations** to resume with the next session unless road or other conditions remain adverse. 若路面或其他情況許可，恢復在下一時段進行的所有課堂 / 考試**

** Examinations refer to internal examinations of PEAK.

** 考試指高峰進修學院校內考試。

Where possible, the Hong Kong Observatory will issue an early alert (i.e. a "Pre-No. 8 Special Announcement") two hours prior to the hoisting of the No. 8 Typhoon Warning Signal.

在上課時間內颱風襲港，如香港天文台在發出八號颱風信號前兩個小時內會發出預警(即八號預警)。

Rainstorms When rainstorm signal is issued, the following arrangements for classes/examinations** of the Institute of Professional Education And Knowledge (PEAK) will apply:

暴雨 香港天文台發出暴雨警告信號期間，高峰進修學院課堂 / 考試** 安排大致如下：

Rainstorm Warning Signal 暴雨警告信號	Action to be taken (PEAK Classes/Examinations**) 安排事宜 (高峰進修學院課堂 / 考試**)
AMBER Rainstorm 黃色暴雨警告	Classes/Examinations** conducted as scheduled (unless specified by PEAK/VTC otherwise) 課堂 / 考試**如期進行 (除非之前高峰進修學院 / 職訓局另有宣佈)
RED Rainstorm 紅色暴雨警告	Classes/Examinations** conducted as scheduled (unless specified by PEAK/VTC otherwise) 課堂 / 考試**如期進行 (除非之前高峰進修學院 / 職訓局另有宣佈)

Rainstorm Warning Signal 暴雨警告信號	Action to be taken (PEAK Classes/Examinations**) 安排事宜 (高峰進修學院課堂 / 考試**)
BLACK Rainstorm 黑色暴雨警告	(a) Issued or in force at 6:15 am or before 11:00 am 上午六時十五分至十一時前發出或仍然生效 PEAK classes/examinations** scheduled to commence within 9:00 am – 12:00 noon 上午九時至正午十二時開始上課之高峰進修學院課堂 / 考試** Cancelled 取消
	(b) Issued or in force at 11:00 am or before 4:00 pm 上午十一時至下午四時前發出或仍然生效 PEAK classes/examinations** scheduled to commence within 12:00 noon – 6:00 pm 正午十二時至下午六時開始上課之高峰進修學院課堂 / 考試** Cancelled 取消
	(c) Issued or in force at 4:00 pm or thereafter 下午四時或以後發出或仍然生效 PEAK classes/examinations** scheduled to commence within 6:00 pm – 10:00 pm 晚上六時至十時開始上課之高峰進修學院課堂 / 考試** Cancelled 取消
	(d) Issued when classes/examinations** are in session 上課 / 考試**期間發出 All classes/examinations** should continue (except those take place outdoors) until the end of the session, and if it is the end of the school day where RED / BLACK signal is still in force, students should be advised to return home only when conditions are safe. 所有課堂 / 考試** (在戶外舉行者除外) 應繼續進行。在課堂 / 考試**結束時, 若已到放學時間, 而紅色/黑色暴雨警告信號仍然生效, 則會在安全情況下才讓學生/學員回家。 <i>Remarks: If students are not yet in the campus premises due to differences in class timetables, they should stay home or take shelter in a safe place. For classes/examinations** conducted outdoors, the responsible staff on the spot should suspend the activities immediately and ensure that all students have taken shelter in a safe place.</i> 注意: 若由於上課時間表安排的差異, 學生 / 學員當時尚未返抵學院 / 上課地點, 應留在家中或在安全地方暫避。如課堂 / 考試**在戶外舉行, 在場負責的職員會即時終止活動, 並安排所有學生 / 學員在安全地方暫避。
	(e) Issued before start of examinations* 考試**開始前發出 Examinations** to be held in that particular session should be postponed . 在該時段舉行的考試**將會延期
Lowering to AMBER Rainstorm Warning signal or lowering of all rainstorm warning signals at any time 改發黃色暴雨警告信號或取消所有暴雨警告信號	All classes/examinations** to resume with the next session unless road or other conditions remain adverse. 若路面或其他情況許可, 恢復在下一時段進行的所有課堂 / 考試**

** Examinations refer to internal examinations of PEAK. ** 考試指高峰進修學院校內考試。

Fees 費用

Apart from programme fees, fees will be charged for provision of other programme-related services to students upon a student's request. These services include the handling of module exemption, appeal on assessment results, replacement of award/attendance certificates etc. Students are advised to contact PEAK direct at 2836 1922 on matters related to fees.

All administrative charges or programme fees quoted are subject to change without further notice.

除報讀課程的費用, 學生如要求其他與課程有關的服務, 包括處理豁免修讀單元的申請, 學業成績評估上訴, 補領畢業/出席證書等, 本院將向學生收取行政費用。學生如需有關行政費用的詳情, 請致電2836 1922向本院查詢。

所有行政或課程費用如有所調整, 恕不另行通知。

Special Discount 特別優惠

Graduates of VTC and former TI / TC graduates can now enjoy 10% discount for taking selected programmes listed in this prospectus. For details, please contact us at 2836 1922.

Remarks:
• Graduates are required to provide the relevant VTC/TI/TC Graduation Certificate or its copy for checking during enrollment.
• Please visit PEAK's website to obtain the latest information on the discounted courses for graduates.

職業訓練局畢業生 (包括前工業學院及科技學院畢業生) 可以九折報讀此課程手冊之部份課程, 詳情請致電2836 1922查詢。

備註:
• 畢業生報讀課程時, 請出示有關VTC/TI/TC畢業證書或影印本, 以供查核。
• 畢業生可享的折扣課程優惠以「高峰進修學院」網站公佈為準。

Classroom Discipline 課室規則

- | | |
|---|------------------------------|
| 1. No eating or drinking is allowed in all classrooms. | 1. 課室內不准飲食。 |
| 2. Smoking is prohibited in all areas of PEAK and VTC Tower. | 2. 學院及大樓範圍內嚴禁吸煙。 |
| 3. Prior approval should be granted by the programme director for audio recording in the class. | 3. 如欲在課堂錄音, 需事先取得課程總監的批准。 |
| 4. Principal of the Institute has the authority to terminate the study of any trainee who violates PEAK's policies. | 4. 如學員違反學院規則, 學院院長有權終止學員的學籍。 |

Suggestions and Complaints 建議及投訴

PEAK is very keen to receive feedback from trainees on all aspects of the Institute. If trainees wish to make a suggestion on or lodge a complaint about any campus matter, they may do so by raising it with the Programme Team Officer. For more details, please call us at 2836 1922 during office hours.

高峰進修學院非常重視學員對學院各方面的意見。如學員對學院事務有任何建議或投訴, 可向課程組主任提出。學員如需更多詳情可於辦公時間內致電2836 1922。

Continuing Education Fund 持續進修基金

Procedures of Application and Claim Reimbursement 申請及申請發還學費手續



Introduction 簡介

The Continuing Education Fund (CEF) subsidizes adults with learning aspirations to pursue continuing education and training programmes. Eligible applicants will be reimbursed 80% of their fees, subject to a maximum sum of HK\$10,000 (whichever is the less), on successful completion of a reimbursable programme or module(s) forming part of the programme. The fees for more than one reimbursable programme may be reimbursed, subject to the maximum ceiling of HK\$10,000 per applicant not being exceeded. The following information is a brief explanation that is based on the CEF website. For enquiries, please call 24-hour CEF hotline at 3142 2277 or visit CEF website at www.sfaa.gov.hk/cef

持續進修基金為有志進修的成年人提供持續教育和培訓資助。合資格的申請人可就多於一個可獲發還款項課程申領發還款項。申請人完成可獲發還款項課程後，可獲發還有關課程費用的80%或上限10,000港元（以數額較小者為準）。以下資料乃根據持續進修基金網頁資料作扼要說明，如有查詢，請致電持續進修基金24小時熱線：3142 2277或瀏覽網頁：www.sfaa.gov.hk/cef。

Application Procedures 申請手續

1. Application forms can be obtained from the Office of the Continuing Education Fund and the website <http://www.info.gov.hk/sfaa/cef/>. Please refer to "Guidance Notes for Application" when completing the application form (www.info.gov.hk/sfaa/cef/download/SFAA191.pdf). (Remark: the CEF Institutional Code of Vocational Training Council is "501").

申請表可於持續進修基金辦事處索取，亦可透過網頁 <http://www.info.gov.hk/sfaa/cef/> 下載。填寫申請表格，請參閱有關持續進修基金“申請指引”(www.info.gov.hk/sfaa/cef/download/SFAA191.pdf)（備註：職業訓練局之持續進修基金編號為501）。

2. The completed CEF application forms must first be certified at the counter of PEAK office. The certified application forms, together with photocopies of Hong Kong Identify Card (HKID), should be submitted by post to the Office of the Continuing Education Fund **before** the commencement of that programme. Late applications will not be accepted.

申請人必須在已報讀的“可獲發還款項課程”開課前將填妥並已獲院校蓋印證明的申請表，連同身份證副本，遞交至持續進修基金辦事處，辦理申請手續。逾期遞交的申請概不受理。

3. Applicants can bring the application form to our counter for certification during the opening hours: Opening hours: 8:45am – 8:00pm (Mon – Fri); 9:00am – 12:00noon (Sat) Address: 9/F, VTC Tower, 27 Wood Road, Wanchai, HK

申請者可於辦公時間將申請表交予本院蓋章。辦公時間：上午8:45 – 晚上8:00（星期一至五）；上午9:00 – 中午12:00（星期六）地址：香港灣仔活道27號職業訓練局大樓9樓。

How to Claim Reimbursement 申請發還款項手續

1. Each successful applicant will be provided with Reimbursement Claim Form (RCF) which should be submitted after successful completion of the programme(s) and, in any event, within four years from the date the application was approved.

持續進修基金辦事處會向申請人直接發出「發還款項申領表」。申請人成功修畢課程後，須在申請獲得批准的日期起計的四年內遞交申領表。

2. "Successful completion" of the programme means that the claimant must pass the programme assessment as required by the programme provider. Each programme provider would have its own method of assessing successful completion of programmes. Please refer to related programme brochures. **Please be reminded that reimbursement can only be claimed upon completion of the whole programme. Completion of an individual module which has not been registered under CEF would not be accepted for the reimbursement.**

“成功修畢”課程是指申請人必須通過本院規定的課程評核。個別課程有其評核成功修畢的標準，請查閱有關課程單張。請注意：申請人必須修畢整個課程才可申請發還款項，如只修畢課程的某部份或某一單元，而該部份或該單元並沒有獨立登記於「持續進修基金可獲發還款項課程」內，其發還款項申請將不獲接受。

3. Claimants should bring the completed RCF with the following documents (Original Copies) to our counter for certification.*

- i. Original copy(ies) of the VTC Official Receipt(s);
- ii. Original copy(ies) of the documentary proof of successful completion of the programme:
 - a. Attendance Certificate; and / or
 - b. Completion Certificate; and / or
 - c. Letters or Transcripts certifying the claimant has passed the relevant course assessment.

***If claimants fail to submit any of the above documents, PEAK will NOT stamp on the RCF.**

申領發還學費的人士須填妥申領表格並連同以下文件（正本）前往本院蓋章*：

- i. 學費收據正本；
- ii. 成功修畢課程的證明文件正本：
 - a. 出席證書 及/或
 - b. 結業證明書 及/或
 - c. 由本院發出的信件或成績單等。

* 如未能出示上述文件，本院有權拒絕於申請表上蓋章。

4. Please refer to CEF information to submit required documents to claim the reimbursement.

請參閱持續進修基金申請資料，將所需文件遞交至持續進修基金辦事處申領發還學費。

報名表

本院專用 Office use only ver 20130415

Received Date: _____ Handled by: _____

Remarks: _____

Application: ☐ Walk-in ☐ By Mail ☐ By Fax

Payment: ☐ Cash ☐ Cheque ☐ Credit Card

申請人資料 (請填寫香港身份證上之姓名)

姓名 (英文): Mr./Ms./Miss _____ (中文): _____ 先生/女士/小姐

香港身份證號碼: _____ 出生日期 (日/月/年): _____

通訊地址: _____

任職機構名稱: _____ 職位 / 部門: _____

電郵地址: (1) _____ (2) _____

日間聯絡電話: _____ 手提: _____ 傳真: _____

開課通知: 請以 ☐ 郵遞 ☐ 圖文傳真 ☐ 電郵 方式發出 (如無指定, 本院將以郵遞方式發出通知)

報讀課程資料

課程編號 / 名稱: _____ 開課日期 (日/月/年): _____ / _____ / _____

(只供報讀文憑 / 證書課程申請者填寫)

單元編號	單元名稱	開課日期

學歷背景

曾經修讀之課程	院校 / 考試	畢業年份	已完成的百分比 (%)

■ 若你希望以成年學生的身分申請入讀課程, 請「✓」此方格。(詳情請參考課程單張)

就業背景 請列寫與本課程有關的就業及職位資料。亦可附上相關僱主的推薦信副本。(若空格不敷應用, 請另頁填寫)

公司名稱	就業時期: 由 / 至	職位名稱	全職 或 兼職

* 請連同相關的學歷證明副本與本表格一併遞交。

付款方式

如報讀之課程在報名當日起7個工作天內開課, 報名人必須以現金繳交學費。

☐ 現金 金額: 港幣 _____ 元

☐ 支票 (抬頭請寫: 職業訓練局) 支票號碼: _____

☐ 信用卡 ☐ 

信用卡號碼: _____

有效期 (MM/YY): _____ 付款額: _____ ☐ 

(持卡人姓名)

(持卡人簽署)

個人資料之使用

☐ 本人同意VTC及其機構成員使用我提供的個人資料, 包括姓名、電話號碼、手機號碼、電郵地址、通訊地址及教育程度, 提供有關VTC及其機構成員的任何課程、招生及活動推廣資訊。(如你日後希望停止接收上述資訊, 或更改個人資料, 請連同你已登記的姓名、電話號碼、手機號碼、電郵地址、通訊地址及教育程度資料, 電郵至peak@vtc.edu.hk或傳真至2891 5707通知我們。)

報名須知

- 每項課程請用一份表格, 如有需要可自行影印。
- 如選擇以支票繳付課程費用, 請將表格連同劃線支票郵寄或親身交回本院 (每項課程須獨立填寫一張支票), 支票抬頭請寫「職業訓練局」, 如以信用卡繳付學費, 請將表格傳真, 郵寄或親身交回本院辦事處。
傳真: 2891 5707 地址: 香港灣仔活道27號職業訓練局大樓9樓高峰進修學院
- 如學員選擇以郵寄或傳真方式交回報名表及課程費用, 請致電2836 1906以便本院確認收到有關表格及費用。
- 所有課程名額均以先到先得方法分配, 任何未填妥之表格, 或未繳交學費, 本院將不會處理。
- 申請人/學員必須細閱及遵守載列於本院課程手冊內之「課程管理指引」, 申請人/學員亦可向本院辦事處索取或從本院網站下載「課程管理指引」。
- CPD分數將按出席時數按比例計算。如學員之出席時數未及課程長度的80%或以上, 學員將不能獲得SFC分數及MPFA分數。有關分數的最小單位為0.5分, 遲到或早退不足半小時亦作半小時計算 (時間計算以本院時鐘為準)。

持續進修基金

- ☐ 申請CEF* (請連同持續進修基金申請表及身份證副本於開課前最少10個工作天交回本院代辦手續, 逾期遞交恕不受理)
- ☐ 已申請 / 不申請

請問您是從以下那途徑得知本課程?

- ☐ Yahoo ☐ Google ☐ PEAK網頁 ☐ 電郵
- ☐ 單張 ☐ 每季課程章程 ☐ 朋友 ☐ 教育展覽會
- ☐ 報紙 / 雜誌 (名稱: _____) ☐ 其他: _____

聯絡方法

如有需要, 本院將以電郵方式發出所有通知 (例: 更改上課時間) 如無提供電郵資料之學員, 本院將以電話聯絡。

聲明

- 本人聲明於本申請表所提供資料均屬真實, 並無遺漏。
- 本人知悉並同意高峰進修學院使用本人之個人資料作處理入學註冊及一切課程與行政之用途。
- 本人知悉並同意高峰進修學院於本人出席CPD/CPT課程時, 查閱本人之身份證明文件以核實身份。
- 本人明白並會盡量填寫足夠資料, 否則學院不能有效地處理本人的申請。
- 本人知悉並同意高峰進修學院以高峰進修學院的時鐘作為量度本人遲到或早退與否的準則。並同意報名須知第6項有關 CPD 分數、SFC分數及MPFA分數的扣減方式。
- 除學員之申請不獲接納或所選的課程取消外, 所有已繳學費恕不退還。學費及學額亦不可作任何更改 (包括不可轉班) 或轉讓他人。

本人已細閱、明白並同意遵守高峰進修學院載於「課程管理指引」、「報名須知」及「聲明」內的規則, 以及高峰進修學院在處理申請人個人資料的部分。

申請人簽名

日期

ENROLLMENT FORM

本院專用 Office use only

ver 20130415

Received Date: _____ Handled by: _____

Remarks: _____

Application: ☐ Walk-in ☐ By Mail ☐ By Fax

Payment: ☐ Cash ☐ Cheque ☐ Credit Card

PARTICULARS OF APPLICANT (Please fill in name as it appears on your HKID card)

Name (Eng) : Mr./Ms./Miss (surname) _____ (given name) _____ (Chinese) : _____ 先生 / 女士 / 小姐

HKID No : _____ Date of Birth: (dd/mm/yyyy) _____

Mailing Address : _____

Company of Employment : _____ Position / Department : _____

E-Mail Address : (1) _____ (2) _____

Telephone (day-time) : _____ Mobile : _____ Fax : _____

Confirmation : Please specify how you would like to be notified: ☐ By mail ☐ By fax ☐ By email (If not specified, we will notify you by Mail)

PROGRAMME APPLIED FOR

Programme Code / Name : _____ Commencement Date (dd/mm/yyyy) : _____ / _____ / _____

FOR DIPLOMA / CERTIFICATE APPLICANTS ONLY

Module Code	Module Name	Commencement Date

Education History

Programme	Institution / Exam	Year of Graduation	Percentage of Completion(%)

■ Please "✓" this box if you want your application to be considered as mature student application. (Please refer to programme leaflet for details)

Employment History

If employed, please list out your employment history and positions you have held, which you consider relevant to the course for which you are applying. You may include certified copies of relevant references from employers. (Please use separate sheet if necessary)

Company Name	Duration: From / to	Position	Full time / Part time

* Please submit relevant qualification documents together with your application.

PAYMENT METHOD

For a programme commencing within 7 working days at the time of enrollment, trainees are required to settle the programme fee by cash.

☐ Cash Amount: HK\$ _____

☐ Cheque (payable to "Vocational Training Council")

Cheque No.: _____

☐ Credit Card

Card Number : _____



Expiry Date : _____ Amount: _____



Cardholder's Name

Authorized Signature

USE OF PERSONAL DATA

☐ I agree that my personal data provided, including my name, phone number, mobile number, email address, correspondence address and education level may be used by the VTC and its member institutions for providing direct marketing information in relation to any programmes, admission and events of VTC and its member institutions. (If you would like to unsubscribe from receiving the said information or update your personal data, please send your request with registered name, phone number, mobile number, email address, correspondence address and education level to peak@vtc.edu.hk or by fax to 2891 5707.)

NOTES FOR APPLICANTS

- Please use one form for each programme and photocopy the form if necessary.
- If you pay the programme fees by cheque, please return the form to us by mail or in person with a crossed cheque (one cheque for one course) payable to "Vocational Training Council". If you pay the programme fees by credit card, please return the form to us by fax/ by mail/ in person.
Fax: 2891 5707 Address: PEAK, 9/F, VTC Tower, 27 Wood Road, Wanchai, Hong Kong
- If you choose to return the enrollment form and cheque payment to PEAK by fax or by mail, please call us at 2836 1906 to confirm our receipt of your application and payment.
- All places are allocated on a first-come-first-served basis. Incomplete forms and forms received without payment will be regarded as unsuccessful applications.
- Applicants/Trainees must read carefully and observe the Programme Administration Guidelines stipulated in PEAK's Programme Prospectus. The Programme Administration Guidelines are also available from PEAK Office and on PEAK Website.
- CPD/CPT credits will be deducted for late trainees on a pro-rata basis. MPFA & SFC credits will be given only when students attend more than 80% of the programme. Minimum unit of above mentioned credits is 0.5 credit. Lateness or early leave which is less than 0.5 hour will still be counted as 0.5 hour (according to PEAK's clock).

CONTINUING EDUCATION FUND (CEF)

☐ Apply for CEF* (Please submit with CEF application form and HKID card copy at least 10 working days before commencement of course. No late submission will be accepted)

☐ CEF Applied / Not applying CEF*

Where did you learn about this course?

☐ Yahoo ☐ Google ☐ PEAK Website ☐ Email ☐ Leaflet

☐ Prospectus ☐ Friend ☐ Newspaper/Magazine (Name: _____)

☐ Education Expo

☐ Other _____

CONTACT METHOD

For all further notice (e.g. Class reschedule), we will contact you by email. Students without email will be contacted by phone.

DECLARATION

- I declare that all information provided in this enrollment form is, to the best of my knowledge, accurate and complete.
- I acknowledge and agree that my personal data will be used by PEAK for enrollment, programme and administrative purposes.
- I acknowledge and agree that PEAK may check my ID card to verify my identity while I am participating in CPD/CPT programme.
- I understand that I should provide as much information to PEAK as I can so that my application can be processed efficiently.
- I acknowledge and agree that PEAK may determine my lateness and early departure from a programme according to PEAK's clock. I also agree to Point 6 of the Notes for Applicants which defines the circumstance for deduction of CPD, SFC and MPFA credits.
- The programme fees paid are non-refundable, except for cases of unsuccessful applications and programme cancellation. Fees paid and places enrolled are not transferable, and request for programme swapping will not be entertained.

I have read, understood and agreed to follow PEAK's rules and guidelines stipulated in "Programme Administration Guidelines", "Notes to Applicants", and "Declaration", and PEAK's policy on handling applicants' personal data.

Applicant Signature

Date

Use of Applicant's Personal Data 申請人資料用途

- The information collected from the application, including the name, phone number, mobile number, email address, correspondence address and education level, will be used for the following purposes:
 - for processing and selection of applications for admission to PEAK/VTC programmes; and related purposes;
 - for obtaining the results of public examinations from the HKEAA, and obtaining information from relevant institutions about your candidature in public examinations and studies in institutions in Hong Kong and elsewhere;
 - for obtaining records of your examination results attained in the programmes provided by member institutions under the VTC;
 - for checking of application records and the study records of the programmes provided by member institutions under the VTC;
 - for storage of information on the successful applicants in the Student Records System; and
 - if applicant indicated his / her wish to receive PEAK information, the application data will be retained for providing direct marketing information in relation to any programmes, admission and events of PEAK. PEAK will seek his / her consent on the application form; PEAK cannot use the personal data without consent.
- PEAK undertakes to keep personal data provided by applicants confidential. However, PEAK may provide such information to any other persons or agents for the purposes described in (1) under a duty of confidentiality to PEAK. If an applicant would like to unsubscribe from receiving the said information or update his / her personal data, please send the request with registered name, phone number, mobile number, email address, correspondence address and education level to peak@vtc.edu.hk.
- In accordance with the Personal Data (Privacy) Ordinance, an applicant has the right:
 - to check whether PEAK holds his / her personal data;
 - to request a copy of such data; and
 - to require PEAK to correct any of the personal data which is inaccurate. Sufficient information will need to be provided to establish identity, otherwise PEAK shall refuse to comply with the request.
- Request for access to data should be submitted in writing to:
PEAK, 9/F, VTC Tower, 27 Wood Road, Wanchai, Hong Kong
- In accordance with the terms of the Ordinance, PEAK reserves the right to charge a fee for the processing of data access request.
- 申請人入學申請所填報的資料，包括姓名、電話號碼、手機號碼、電郵地址、通訊地址及教育程度，其用途如下：
 - 處理一切有關職業訓練局高峰進修學院課程的入學申請及甄選事宜；及相關用途；
 - 向香港考試及評核局索取申請人的公開考試成績，以及向本港或以外的有關院校，索取申請人的公開試及校內試修業成績；
 - 索取申請人在職業訓練局轄下院校及中心的成績；
 - 核對申請人申請紀錄，以及核對申請人在職業訓練局轄下院校及中心就讀的紀錄；
 - 儲存獲取錄的申請人資料於學生紀錄系統；及
 - 若申請人表示願意收到高峰進修學院的資訊，將使用申請人所填報的個人資料，提供有關高峰進修學院的任何課程、招生及活動推廣資訊。申請人可於填寫申請表時表示同意，否則本院不會使用其個人資料作相關用途。
- 高峰進修學院會對申請人的資料絕對保密，但可將申請人的個人資料，給予對本院有保密承諾的任何人士或其代表，用於(1)段所述的用途。如申請人日後希望停止接收上述的資訊，或更改個人資料，請連同已登記的姓名、電話號碼、手機號碼、電郵地址、通訊地址及教育程度資料，電郵至peak@vtc.edu.hk通知本院。
- 根據個人資料(私隱)條例，申請人有權：
 - 查閱高峰進修學院是否持有他的個人資料；
 - 要求獲得上述資料的副本；及
 - 要求高峰進修學院更正他的個人資料。申請人必須提供足夠資料予高峰進修學院以識別身份，否則本院有權拒絕上述要求。
- 申請人如欲查閱個人資料，須以書面形式向高峰進修學院提出，地址如下：
高峰進修學院
香港灣仔活道27號職業訓練局大樓9樓
- 本院保留權利收取查閱資料所需行政費用。

Declaration 聲明

- I declare that the information given in this application is, to the best of my knowledge, accurate and complete. I understand that this information will be used in the admission process of the Programmes offered by PEAK.
- I authorise PEAK to obtain, and the relevant authorities (which include the Hong Kong Examinations and Assessment Authority, VTC, etc.) to release, any and all information about my results of any public examinations and my studies in institutions in Hong Kong and elsewhere.
- I authorise PEAK to use my data to carry out checks on any applications for admission to programmes it offers and checks on records of current and previous studies in VTC member institutions.
- I understand that, upon my registration in a programme in PEAK, the data contained in this application will become part of my student record and may be used for all purposes relating to my study in PEAK.
- I understand that PEAK may use my application data for statistical purposes. The application form and other related personal information will be disposed of after the completion of the admissions exercise. Nevertheless, if I have indicated in the application form that I wish to receive information about PEAK, my application data will be retained.
- I understand that provision of any false or misleading information therein shall lead to **DISQUALIFICATION** of my application without notice and cancellation of any resultant registration, and any fees paid will **NOT** be refunded.
- 本人謹此聲明在本申請表填報的資料均屬正確無誤，並明白填報之資料將會在高峰進修學院的招生過程中作參考之用。
- 本人授權高峰進修學院索取有關本人在香港或外地參加的公開考試及就讀資料，並授權有關機構（其中包括香港考試及評核局及職業訓練局）提供此等資料。
- 本人授權高峰進修學院使用本人的資料查詢任何有關申請入讀該院課程事宜及有關本人過往及現在於職業訓練局轄下院校及中心就讀的資料。
- 本人明白在註冊後，有關資料將轉作學生紀錄，高峰進修學院可利用該等紀錄作學術或行政上之用。
- 本人明白高峰進修學院可能使用本人的入學申請資料作統計及分析用途，本人的申請表及有關的個人資料會於高峰進修學院收生程序完結後銷毀。然而，若本人於申請表表示願意收到高峰進修學院的資訊，則我的申請資料將被保留。
- 本人明白提供任何虛假或誤導性資料會導致本人的申請資格被取消，雖經註冊，亦屬無效，所繳費用不會退還。

www.peak.edu.hk

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