

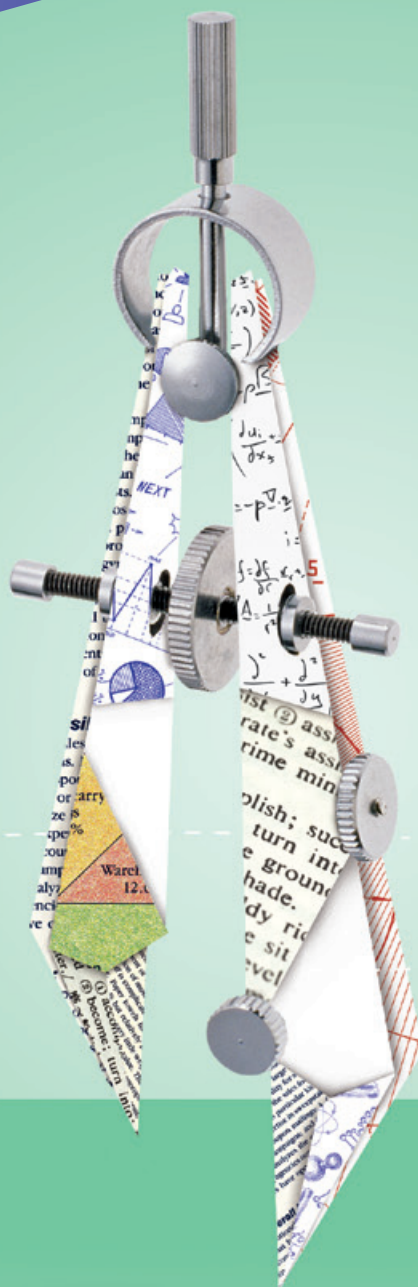
高峰進修學院

Institute of Professional Education And Knowledge

PEAK

Member of VTC Group
VTC 機構成員

FEB - APR
2015



規劃未來

持續專業發展課程及
短期課程手冊
Continuing Professional
Development (CPD) Programme
and Short Course Prospectus

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



Happy New Year!

As one of the leading programme providers of professional education and training programmes, PEAK strives to provide a wide spectrum of Continuing Professional Development programmes (CPD) to refresh and enhance financial practitioners' knowledge from soft skills to latest rules and regulations in the financial industry.

In the coming quarter, PEAK is offering 8 new programmes and the following are the highlights:

After several months of pilot programme, The Shanghai-Hong Kong Stock Connect was officially launched on 17 November 2014. This new cross-border investment channel will enable investors in Hong Kong and the Mainland to trade a specified range of listed stocks in each other's market through their respective local securities companies. To better prepare the financial practitioners with the new channel, a series of programmes on wealth management is offered to help understand the characteristics and risk management measures on investment in stock markets of both cities.

In order to cater for the rapidly changing social and economic environment, new insurance products are launched regularly. As a frontline practitioner, you have to keep abreast of the latest development. In view of this, PEAK is offering a new series "Life Insurance series: protection insurance, investment related products & retirement products" which looks at how the industry has adapted its structure, products and practices.

Law related knowledge is a must for Financial Planner when they develop the financial or asset protection plan for their clients. PEAK offers a new programme on Family Law in which participants could acquire the knowledge and information on prenuptial agreements, asset management after divorce, wills and trusts.

Apart from the informative programme, we have also invited an acclaimed investment expert to make a forecast on the market in the coming year. Ms Agnes Wu, the celebrated stock commentator, will review the market in 2014 and analyse the trend on the global market in the seminar, 'Market Outlook 2015 by Agnes Wu'. You will definitely gain some insights in making your investment portfolio for 2015.

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
Jan 2015

新年進步!

高峰進修學院 (PEAK) 作為提供專業教育及培訓的領導機構之一，不斷致力為客戶提供不同範疇的持續專業發展 (CPD) 課程，內容涵蓋軟技能及金融行業的最新規則和法規，加強金融從業人員的知識。

PEAK在來季將會提供8個全新課程，以下是來季CPD最新課程的精選概覽。

經過數個月的試點方案，滬港股票市場交易互聯互通機制於2014年11月17日正式推行。這個新的跨境投資渠道讓投資者可在香港及上海市場透過本地證券公司買賣指定範圍內的股票。為了讓金融從業員為滬港通作更好的準備，PEAK推出了一個有關財富管理的課程系列，幫助學員了解兩地股票市場投資的特點和風險管理措施等。

為了迎合迅速改變的社會和經濟環境，保險市場會定時推出新產品。作為前線的金融從業員，您必須掌握有關的最新資訊。有鑑於此，PEAK提供了一個相關的課程系列 "Life Insurance series: protection insurance, investment related products & retirement products" (以英語授課)，探究保險業如何調整行業結構，產品及做法。

財務策劃師為客戶籌劃財務或資產保障計劃時，法律相關的知識是必須要的。PEAK推出了一個有關家庭法的新課程，學員可學習到婚前協議書、離婚後的資產管理、遺囑和信託等的相關知識。

除了以上的課程外，PEAK還邀請了一位資深的投資專家，與您分享對未來一年市場走勢的專業意見。著名股票評論員胡孟青小姐會為我們主講「2015投資市場展望」，回顧2014年的投資環境和分析全球市場的趨勢，您絕對能夠為制定2015年的投資組合取得一些見解。

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
2015年1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 2013/2014 alone, over 80,000 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2013/14年度計算，超過80,000人曾報讀本院課程。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產品或專業服務，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 Enquiry : Tel : 2836 1922
Website : <http://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 : <http://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 the mentioned festive days are Saturdays, the office hour is 9:00am to 12:00noon). 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於下午五時十五分開關(如上述節慶日子為星期六，辦公時間將會為上午九時至中午十二時)。如對本院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

Guide To Western Menu

西餐指南

Programme Introduction

A foreign visitor who orders a steak in a Chinese restaurant, refusing to try anything else is not very endearing. The one who wants fortune cookies and eats sweet and sour pork with a fork and a knife may be marginally better, but we tend to feel a lot closer to a foreigner who can order Cha Siu Bao and eats chicken feet with his chopsticks ...because he is sufficiently interested in our culture to want to try, he shows us respect.

It works likewise vice versa. Globalisation is all about respecting other people's culture, of which food is an integral part. Be it a business luncheon or dinner with a hot date, knowledge in international cuisines has become a vital fundamental in social skills. Still unfamiliar with foreign food culture? Don't miss this opportunity & register today!

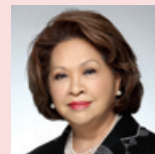
若然一位外國訪客到中國餐館只會選擇牛扒，任何地道菜色皆搖頭拒絕嘗試，畢竟有點令人失望。一位尋找「幸運曲奇」，或用刀叉來吃糖醋排骨的，

比前者略較皆，但我們總是對會點叉燒包的，能用筷子吃鳳爪的外國人更有親切感……因為他們對我們的文化感興趣，願意嘗試融合，這表達了對我們的尊重。

相對亦然。全球一體化的關鍵就是互相尊重各國的文化，飲食正是其中不可或缺的一個重要環節。不論是商業應酬或與異性共進燭光晚餐，國際美食知識早已

成為社交的重要基礎。若閣下對西方飲食文化仍只是一知半解？那就不能錯過這個課程，立即報名吧！

Speaker



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緣圈的董事總經理

Code 編號	Programme Information 課程資料	Fee 費用	Remarks 備註
PE4200080	地中海（希臘，意大利，西班牙和葡萄牙） The Mediterranean (Greece, Italy, Spain and Portugal) 日期：7.2.15 時間：2:30pm - 4:00pm 時數：1.5 小時	HK\$350	Taught in Cantonese supplemented with English terminology
PE4200081	拉丁美洲（巴西，阿根廷，智利，秘魯，墨西哥）和盎格魯 範圍（美國，澳大利亞，英國） Latin America (Brazil, Argentina, Chile, Peru, Mexico) and Anglosphere (USA, Australia, UK) 日期：21.3.15 時間：2:30pm - 4:00pm 時數：1.5 小時	HK\$350	Taught in Cantonese supplemented with English terminology
PE4200082	中歐+北歐美食（法國，德國，奧地利，瑞士，瑞典） Central Europe + Nordic Cuisines (France, Germany, Austria, Switzerland, Sweden) 日期：25.4.15 時間：2:30pm - 4:00pm 時數：1.5 小時	HK\$350	Taught in Cantonese supplemented with English terminology

Anti-Money Laundering Course for Money Service Operators

金錢服務經營者打擊洗錢課程

Speakers 講師



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。此外，去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。



陳振廉先生 CPA

陳先生擁有超過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。



Mr. Dheeraj Bajpai

Mr. Dheeraj is the in-house Compliance Chief of City Foreign Exchange Ltd (CFEL). He has a vast experience of over 8 years in the MSO business and handling of day to day compliance related issues. He provides practical advice, ideas and strategies to identify the fraudulent activity, Customer Due-Diligence and other regulatory requirements. He is also responsible for AML training, involving in transaction monitoring as well as the filing of STRs for all Sub agents of Western Union under CFEL.

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 and On-going Monitoring 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）》的要求，提高從業員對客戶盡職審查及持續監察的意識，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 香港金錢服務業協會簡介 (MSOA)

Hong Kong Money Service Operators Association Limited as a non-profit organization, 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組織相關要求，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。

Code 編號	Programme Information 課程資料	Remarks 備註
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：05.02.15 (Thu) 時間：7:30pm - 9:30pm 時數：2小時 費用：HK\$300 Or HK\$200** (**licensed money service operators only)	Taught in English
PE4200083	金錢服務經營者打擊洗錢課程 - 持續監察及個案分析 Anti-Money Laundering Course for Money Service Operators - Ongoing Monitoring and Case Studies 日期：30.04.15 (Thu) 時間：7:30pm - 9:30pm 時數：2小時 費用：HK\$300 Or HK\$200** (**licensed money service operators only)	Taught in Cantonese supplemented with English terminology

** Fee Discount:

The fee for licensed money service operators is HK\$200 per person. To verify the eligibility to the special discount, licensed money service operators must enroll in the course through the Hong Kong Money Service Operators 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\$200。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



New CPD Programmes
全新持續專業發展課程

Life Insurance Series: Protection Insurance, Investment Related Products & Retirement Products

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.

Programme Introduction

Long term insurance is a rapidly changing market that faces major pressures and strategic challenges.

Today's long term insurance market reflects the complexity of most people's lives. The more so in Hong Kong with a modern strident middle class, growing net worth and aging population.

In addition to traditional life assurance with its own numerous add benefits and variations, a whole range of innovative products are now available. These include:

1. Income protection
2. Retirement and savings products
3. long term care
4. Insurance for specific groups
5. critical illness

It is not only the types of products that have evolved to changing needs, many banks count themselves amongst the providers. The trend is clear for direct to consumer marketing.

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

This series looks at how the industry has adapted its structure, products and practices to cater for the rapidly altering social and economic environment.

Programme Contents

PE4200075: Protection products

The first part of the series discusses the range of products and with the objective of providing protection rather than investment. That said some protection products do include an element of investment providing the opportunity to earn bonuses over and above the basic sum assured.

Contents:

1. Life
2. Critical illness
3. Income protection (IP)
4. Long term care
5. Group market and business insurance

Outcomes:

After the seminar participants should be able to:

- Appreciate the types and structure of protection products
- Key provisions of life, critical illness and IP policies
- Uses of protection products
- Purpose and benefits of group covers

PE4200076: Investment products

The second part of the series discusses protection products, such as whole life, which can have an investment element in the form of a with profits policy, where benefits are indirectly linked to investment performance. This programme looks at life assurance products where the main objective is investment.

Contents:

1. Types of investment
2. Regular premium life policies
3. Single premium life policies
4. Offshore life policies

Outcomes:

After the seminar participants should be able to:

- Differentiate type of investments which customers can purchase
- Explain regular and single premium life assurance policies used for investment and how to value each type

PE4200077: Retirement products

The third part of the series discusses the various long term options which are available to consumers to provide income during retirement. We also look at the need for long term care and how it may be financed.

Contents:

1. Tax/regulation issues
2. Personal pensions
3. Company pensions
4. Defined benefit (DB)
5. Defined contribution (DC)
6. Stakeholder pensions
7. Group arrangements
8. MPF
9. Individual savings accounts
10. Annuities
11. Long term care

Outcomes:

After the seminar participants should be able to:

- Understand local tax limits on pension savings and benefits
- Different types of annuity products
- Products for long term care






Enquiries


Ms. Jenny Chu

Tel: 2919 1404

Email: 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
PE4200075	Protection Products Date: 4.2.15 Time: 2:15pm - 5:15pm Duration: 3 hours	PIBA CPD*  HK\$270	-	3 non-core	3	Life & Health Insurance
PE4200076	Investment Products Date: 2.3.15 Time: 2:15pm - 5:15pm Duration: 3 hours	PIBA CPD*  HK\$270	3	3 non-core	3	Life & Health Insurance
PE4200077	Retirement Products Date: 15.4.15 Time: 2:15pm - 6:15pm Duration: 4 hours	PIBA CPD*  HK\$360	4	4 non-core	4	Life & Health Insurance

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

 Taught in English

Common Personal Insurance Claims Disputes

常見個人保險索償爭議

講者簡介



李俊明先生

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。

課程目的

通過剖析本港常見的壽險、醫療險和其他個人保險索償爭議案例：

- 讓學員知悉其於向客人提供保險意見時，應著重解釋披露某些重要事實的重要性，容易被客人誤解的承保及不保項目，和容易被客人忽略的被保險人（保單生效後）責任。
- 讓學員了解法庭及保險索償投訴局在進行裁決時所採用的多項原則，進而提升自身詮釋保險合約的能力。

課程對象

個人保險從業員

課程摘要

- 索償程序
- 下列類別的個案分析：沒有披露事實、保險合約的詮釋、違反保單條款或條件、賠償金額、不保事項。

課程特色

課程中分析的個案，多屬保險索償投訴局的投訴委員會曾經裁決過的個案。保險索償投訴局的《公司章程》第82條(a)及(b)款規定，投訴委員會於裁決時，（有別於法庭）有權考慮個案涉及的其他事宜，毋須死硬詮釋保單條款。

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
PE4200073	常見個人保險索償爭議 Common Personal Insurance Claims Disputes 日期：10.2.15 時間：6:45pm - 9:45pm 時數：3小時	HK\$270	-	3 non-core	3	General Insurance

查詢

Ms. Jenny Chu

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Market Outlook 2015 by Agnes Wu

2015投資市場展望 — 胡孟青小姐主講

課程簡介

PEAK一年一度邀請投資專家—胡孟青小姐，和大家一起總結2014年投資市場的具體情況，重溫一些影響市況的重要因素，並會預測今年環球投資市場趨勢，分享一些宜攻宜守的投資板塊等，讓投資者及早訂定2015年的投資策略，在市場上大展鴻圖。預祝大家投資回報豐盛！

對象

投資者或業內人士

講題

- 回顧2014的投資環境及影響市況的重要因素
- 中、港、美經濟及息口走向
- 抗衡通脹的投資全攻略
- 展望2015年環球投資市場表現

主講嘉賓



資深投資界名咀青姐 - 胡孟青小姐

胡孟青小姐現為香港財經資訊顧問有限公司董事。曾任滙豐金融服務（亞洲）有限公司副總裁、高信集團控股有限公司副總經理、高信證券有限公司交易董事、中銀集團保險有限公司投資部主管等。現時亦為新城財經台擔任節目主持，並經常於其他媒體、網站及報章之財經版發表股市評論文章，不時參與不同機構的講座活動及教育機構如港大及理大的校外進修學院舉辦之證券分析課程及教學活動，也曾為科大商學院學生會顧問委員會顧問之一。

胡小姐持有英國列斯特大學經濟學士學位，及香港城市大學財務碩士學位。擁有超過十三年證券研究分析經驗，及超過六年財產保險基金投資管理經驗。

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
PE4200068	2015投資市場展望講座 - 胡孟青小姐主講 Market Outlook 2015 by Agnes Wu 日期：3.3.15 時間：6:30pm - 9:30pm 時數：3小時	PIBA CPD* HK\$270	3	3	3	Investment & Financial Planning

* 此本課程由本院與香港專業保險經紀協會 (PIBA) 合辦，完成課程後可獲保監處認可CPD學分。香港專業保險經紀協會會員經該會報讀本課程，可獲折扣優惠，優惠詳情可直接聯絡香港專業保險經紀協會。

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

查詢

談小姐

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Family Laws for Financial Planners 家庭法 (理財策劃師須知)

查詢

Ms. Jenny Chu

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講者簡介

講者譚顯旺先生，於1997年成為香港律師，累積了豐富教學經驗。現任高峰進修學院兼職講師，主講家庭法、保險法和資產策劃等課程。

課程目的

理財策劃師為客人設計理財或資產保障計劃時，需要考慮眾多複雜的因素，包括可能給計劃的可行性帶來限制的法律規定，當中包括家庭法。本課程旨在讓任職理財策劃師的學員認識相關的家庭法規定，以助其提升提供專業意見的能力。

課程對象

理財策劃師

課程摘要

以下幾項的相關法律及案例：婚前協議、離婚時的資產處置、遺囑、信託等。

課程特色

本學院現有的CPD課程中有些已經涵蓋保險、遺囑、信託等相關法律，而本課程所論及的婚前協議、離婚時的資產處置等相關法規，則是全新的內容，有助擴闊有關知識的層面。

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
PE4200074	家庭法 (理財策劃師須知) Family Laws for Financial Planners 日期：13.3.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Investment & Financial Planning

▲ Subject to HKCAAVQ approval

MPF & HK Retirement Needs 強積金與香港退休需要

查詢

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課程目的

此強積金核心培訓課程會探討現有強積金和其他福利保障計劃，將如何面對香港人口老齡化的挑戰，及對香港未來經濟發展的影響，亦會就香港及其他發達國家的退休保障作出詳細比較。讓學員能夠加深了解改善強積金及其他退休策劃的迫切需要。

課程對象

1. 香港人口特徵
2. 經濟發展
3. 退休政策、強積金及其他退休保障制度
4. 香港的現況

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
PE4200069	強積金與香港退休需要 MPF & HK Retirement Needs 日期：1.4.15 時間：6:30pm - 8:30pm 時數：2小時	HK\$285	2	2 core	2	MPF & Others
PE4200069	強積金與香港退休需要 MPF & HK Retirement Needs 日期：21.4.15 時間：6:30pm - 8:30pm 時數：2小時	HK\$285	2	2 core	2	MPF & Others

⌘ Subject to MPFA's approval

Corporate Governance

企業管治

Programme Introduction

This programme is suitable for the insurance practitioners including agents, brokers, underwriters and claims who want to acquire corporate governance principles and models to equip themselves for being an executive who needs to manage different stakeholders effectively.

Programme Contents

1. Overview of Corporate Governance: legal structure, monitoring and executive compensation
2. Corporate Governance Models around the world: widely held firms vs concentrated ownership firms
3. Best Corporate Governance Disclosure Award
4. Market Research Report
5. Academic Research
6. Case Studies

Facilitator

Dr. Ricky Chung B.Sc, MBA, M.Sc, LL.M, DBA, CFA, CFP^{CM}, FRM, CMA

Dr. Chung is currently the Director of CNN Financial Training & Consultancy Limited. He has gained extensive experiences in financial industry and education sector for over 20 years. He had worked as Research Analyst, Dealer of Securities and Derivatives products, and Dealing Manager (Head of Futures) with a number of brokerage firms such as Standard Chartered Securities and CEF Brokerage Ltd. 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. As a professional business and finance educator, Ricky has also been providing professional services, for example, by serving IFPHK as Judge and Case Writer of the SCMP/IFPHK Financial Planner Awards, CPD speaker, Reviewer for Chinese Investment textbook and currently Board member, External Adviser for Chu Hai College of Higher Education, Consultant for VTC Peak, and Validation Panel Members for HKCAAVQ, Community College of City University, Hong Kong College of Technology, HKU SPACE, etc.

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.



Enquiries

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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
PE4200078	企業管治 Corporate Governance 日期 : 31.3.15 時間 : 1:15pm - 6:15pm 時數 : 5小時	HK\$450	5	5 non-core	5	Management & Soft Skills

* These programmes are co-organised with Professional Insurance Brokers Association (PIBA) and will be recognised 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

Wealth Management

財富管理



Enquiries

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Programme Introduction

Long term insurance is a rapidly changing market that faces major pressures and strategic challenges.

Today's long term insurance market reflects the complexity of most people's lives. The more so in Hong Kong with a modern strident middle class, growing net worth and aging population.

Programme Objectives

The programme provides a comprehensive coverage of the latest development of Shanghai-Hong Kong Stock Connect and helps financial professionals to understand the characteristics and risk management measures on investment in stock markets of both cities.

Programme Contents

Wealth Management – Module 1:

The Shanghai-Hong Kong Stock Connect Recent Development

財富管理 – 單元一：滬港通最新發展

- Background of the mutual stock market access between Hong Kong and Shanghai
 - History
 - Involved government bodies and regulators
 - Related industries and key players in these industries
- Investor eligibility
 - Requirements for investors on both HK and SH sides
- Participant eligibility
 - North bound
 - South bound
- Trading analysis after official launch
 - Transaction volumes
 - Trend

Duration: 3 hours

Wealth Management – Module 2:

The Shanghai-Hong Kong Stock Connect Overview

財富管理 – 單元二：滬港通概況

- Background, trading and operational systems on both HK and SH stock markets
 - Key background information of the two stock markets
 - Characteristic of the stock exchange
 - Characteristic of stock market participants
 - Difference on shares in both markets
 - Quote system
 - Market information
- Investor protection
 - Regulatory framework of both cities

Duration: 2 hours

Wealth Management – Module 3: Risk Management in The Shanghai-Hong Kong Stock Connect

財富管理 – 單元三：滬港通的風險管理

- Risk management of the company offering the services
 - Market risk
 - Operational risk
 - Settlement risk
 - Credit risk
- Risk management of institutional/personal investors
 - Understand the stock market mechanism
 - Risk management tool (i.e. how to hedge certain investment)
 - Foreign exchange risk
 - Market risk (stock goes up or down)
 - Others (i.e. trading hours, different in investor characteristics)

Duration: 3 hours

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
PE4200070	財富管理 - 單元一：滬港通最新發展 Wealth Management – Module 1: The Shanghai-Hong Kong Stock Connect Recent Development 日期：16.4.15 時間：9:30am - 12:30pm 時數：3小時	▲ HK\$270	3	3 non-core	3	Investment & Financial Planning
PE4200072	財富管理 - 單元三：滬港通的風險管理 Wealth Management – Module 3: Risk Management in The Shanghai-Hong Kong Stock Connect 日期：16.4.15 時間：2:00pm - 5:00pm 時數：3小時	▲ HK\$270	3	3 non-core	3	Investment & Financial Planning
PE4200071	財富管理 - 單元二：滬港通概況 Wealth Management – Module 2: The Shanghai-Hong Kong Stock Connect Overview 日期：16.4.15 時間：6:30pm - 8:30pm 時數：2小時	▲ HK\$180	2	2 non-core	2	Investment & Financial Planning

▲ Subject to HKCAAVQ approval

Hong Kong Bancassurance Market Review

香港銀行保險市場概覽



Enquiries

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Programme Introduction

This programme is suitable for the insurance practitioners including agents, brokers, underwriters and claims who want to understand the history and the current development in Hong Kong Bancassurance to explore more business opportunities.

Programme Contents

1. Historical Developments of Hong Kong Bancassurance
2. Introduction to the major players and the current market shape
3. Strategic alliance with insurers or intermediaries
4. Strengths and weakness for the bank distribution channel
5. Type of products
6. Future trend

Facilitator

Mr. Terrance Yeung MBA

Terrance has over 40 years extensive experience in general insurance working as key management in multi-national insurance companies and intermediaries focus on business development, insurance placement, technical underwriting and corporate management including bancassurance, marine insurance and other general insurance. He has a Postgraduate Diploma in Management Studies from University of Lincoln and a Master of Business Administration Degree from University of South Australia.

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
PE4200079	Hong Kong Bancassurance Market Review 香港銀行保險市場概覽 日期：27.4.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills

* These programmes are co-organised with Professional Insurance Brokers Association (PIBA) and will be recognised 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

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
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：2.2.15 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
626F2	商品投資系列 單元四：軟商品 Investing in Commodities Series Module 4: Soft Commodities 日期：2.2.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
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：3.2.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	-	3 non-core	3	General Insurance
PE4200075	Protection Products  Date: 4.2.15 Time: 2:15pm - 5:15pm Duration: 3 hours	HK\$270	-	3 non-core	3	Life & Health Insurance
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：4.2.15 時間：3:00pm - 5:00pm 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
842E2	醫療保險計劃 Medical Insurance Plans 日期：4.2.15 時間：3:30pm - 5:30pm 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：4.2.15 & 5.2.15 時間：6:30pm - 9:30pm 時數：6小時（共2堂）	HK\$540	6	6 non-core	6	Investment & Financial Planning
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：5.2.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills

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

 Taught in English

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-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：5.2.15 時間：3:00pm - 5:00pm 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
708I3	受信人責任 - 代理人、受托人及董事 Duties of Fiduciaries – Agents, Trustees and Directors 日期：5.2.15 & 12.2.15 時間：6:30pm - 9:00pm 時數：5小時 (共2堂)	HK\$450	5	5 non-core	5	General Insurance
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：6.2.15 時間：2:00pm - 4:00pm 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
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：6.2.15 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 (金融服務專業專才) 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：7.2.15 時間：9:00am - 2:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
SC-2074-12	危機管理 - 認識危機的因緣和合 日期：7.2.15 時間：2:00pm - 5:00pm 時數：3小時	中 HK\$270	3	3 non-core	3	Management & Soft Skills
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：9.2.15 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
SC-2075-12	危機管理 - 恐懼感=危機感? 日期：9.2.15 時間：2:00pm - 5:00pm 時數：3小時	中 HK\$270	3	3 non-core	3	Management & Soft Skills
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：9.2.15 時間：6:30pm - 8:30pm 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
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：10.2.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	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
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：10.2.15 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：10.2.15 時間：3:00pm - 5:00pm 時數：2小時	HK\$180	2	2 non-core	2	General Insurance
PE4200073	常見個人保險索償爭議  Common Personal Insurance Claims Disputes 日期：10.2.15 時間：6:45pm - 9:45pm 時數：3小時	HK\$270	-	3 non-core	3	General Insurance
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：10.2.15 & 11.2.15 時間：6:30pm - 8:30pm 時數：4小時（共2堂）	HK\$360	4	4 non-core	4	Investment & Financial Planning
262I2	香港保險法例個案 Hong Kong Insurance Legal Cases 日期：11.2.15 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
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：11.2.15 時間：3:30pm - 5:30pm 時數：2小時	HK\$180	-	2 non-core	2	Life & Health Insurance
739F2	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 日期：12.2.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	General Insurance
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：12.2.15 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：12.2.15 時間：6:30pm - 8:30pm 時數：2小時	HK\$285	2	2 core	2	MPF & Others
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：12.2.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning


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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：13.2.15 時間：3:00pm - 5:00pm 時數：2小時	HK\$180	2	2 non-core	2	Investment & Financial Planning
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：14.2.15 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：14.2.15 時間：11:15am - 2:15pm 時數：3小時	HK\$270	3	3 non-core	3	General Insurance
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：14.2.15 時間：1:30pm - 6:30pm 時數：5小時	# HK\$450	-	5 non-core	5	General Insurance
624F2	商品投資系列 單元二：原油 Investing in Commodities Series Module 2: Crude Oil 日期：16.2.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	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：17.2.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	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：17.2.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Investment & Financial Planning
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：23.2.15 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
SC-1313-07	「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 日期：23.2.15 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：23.2.15 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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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：24.2.15 時間：3:00pm - 5:00pm 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
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：24.2.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills
452D2	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 日期：24.2.15 & 25.2.15 時間：6:30pm - 9:00pm 時數：5小時（共2堂）	HK\$450	5	5 non-core	5	Investment & Financial Planning
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：25.2.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	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：26.2.15 時間：2:00pm - 6:00pm 時數：4小時	中 HK\$360	4	4 non-core	4	Management & Soft Skills
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：26.2.15 時間：6:30pm - 8:30pm 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
PE4200016	強積金資訊重溫 and 更新 MPF Information Review & Updates 日期：26.2.15 時間：6:30pm - 8:30pm 時數：2小時	HK\$285	2	2 core	2	MPF & Others
731F2	互聯網世代的商機和人事（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：26.2.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills
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：26.2.15 & 5.3.15 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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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：27.2.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
393E2	“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 日期：27.2.15 時間：2:00pm - 6:00pm 時數：4小時	HK\$360	4	4 non-core	4	Management & Soft Skills
763F2	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 日期：27.2.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$330	3	3 non-core	3	General Insurance
SC-2061-11	說服技巧（金融服務業專才）單元二：超卓的說服技巧 Persuasion Skills for Financial Professionals Module 2: Excel Your Persuasion Skills 日期：28.2.15 時間：9:00am - 12:00pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills
PBA00041	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 日期：28.2.15 時間：9:00am - 12:00pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills
PBA00042	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) 日期：28.2.15 時間：12:15pm - 2:15pm 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
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：28.2.15 時間：1:30pm - 6:30pm 時數：5小時	# HK\$450	-	5 non-core	5	General Insurance
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：2.3.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Investment & Financial Planning
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：2.3.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Investment & Financial Planning

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PE4200076	Investment Products  PIBA CPD*  Date: 2.3.15 Time: 2:15pm - 5:15pm Duration: 3 hours	HK\$270	3	3 non-core	3	Life & Health 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: 2.3.15 時間: 6:30pm - 8:30pm 時數: 2小時	HK\$180	2	2 non-core	2	Investment & Financial Planning
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: 3.3.15 時間: 1:00pm - 6:00pm 時數: 5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
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: 3.3.15 時間: 1:00pm - 6:00pm 時數: 5小時	HK\$450	5	5 non-core	5	Investment & Financial Planning
PE4200068	2015投資市場展望講座 - 胡孟青小姐主講  PIBA CPD* Market Outlook 2015 by Agnes Wu 日期: 3.3.15 時間: 6:30pm - 9:30pm 時數: 3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
260I2	僱員補償條例  Employees' Compensation Ordinance Date: 4.3.15 Time: 9:15am - 5:30pm Duration: 7 hours(12:45-2:00 Lunch)	HK\$630	7	7 non-core	7	Law & Compliance
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: 4.3.15 時間: 3:00pm - 5:00pm 時數: 2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
761F2	打擊洗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: 4.3.15 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: 5.3.15 時間: 2:00pm - 5:00pm 時數: 3小時	HK\$270	3	3 non-core	3	Management & Soft Skills

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

 Taught in English

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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：5.3.15 & 6.3.15 時間：6:30pm - 8:30pm 時數：4小時（共2堂）	HK\$440	4	4 non-core	4	General Insurance
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：6.3.15 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	3	3 non-core	3	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：7.3.15 時間：9:00am - 11:00am 時數：2小時	HK\$180	2	2 non-core	2	General Insurance
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：7.3.15 時間：9:00am - 11:00am 時數：2小時	HK\$180	2	2 non-core	2	General Insurance
718E2	領導的教練技術 Coaching as a Leadership Tool 日期：7.3.15 時間：9:00am - 2:00pm 時數：5小時	中 HK\$450	5	5 non-core	5	Management & Soft Skills
SC-2076-12	危機管理 - 同行如敵國？ 日期：7.3.15 時間：2:00pm - 5:00pm 時數：3小時	中 HK\$270	3	3 non-core	3	Management & Soft Skills
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：9.3.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Investment & Financial Planning
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：9.3.15 時間：3:00pm - 5:00pm 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
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：9.3.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	General Insurance
PE4200034	投資策劃（基金） Investment Planning (Mutual Funds) 日期：9.3.15 & 16.3.15 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

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
780E2	保險索償替代爭議解決方法 Alternative Insurance Dispute Resolution 日期：10.3.15 時間：9:30am - 12:30pm 時數：3小時	HK\$270	3	3 non-core	3	Law & Compliance
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：10.3.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
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：10.3.15 時間：2:00pm - 4:00pm 時數：2小時	HK\$180	2	2 non-core	2	Investment & Financial Planning
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：10.3.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills
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：10.3.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
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：11.3.15 時間：1:00pm - 5:00pm 時數：4小時	HK\$360	4	4 non-core	4	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：11.3.15 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	-	3 non-core	3	Life & Health Insurance
719E2	強化領導力 High Impact Leadership Skills 日期：11.3.15 時間：6:45pm - 9:45pm 時數：3小時	中 HK\$270	3	3 non-core	3	Management & Soft Skills
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：12.3.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	General Insurance
PE4200016	強積金資訊重溫 and 更新 MPF Informamtion Review & Updates 日期：12.3.15 時間：6:30pm - 8:30pm 時數：2小時	HK\$285	2	2 core	2	MPF & Others

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PE4200022	保險及金融法規遵守 - 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：12.3.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Law & Compliance
746E2	旅遊保險 (人身) Travel Insurance (Person) 日期：12.3.15 時間：6:45pm - 9:45pm 時數：3小時	HK\$270	-	3 non-core	3	General Insurance
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：13.3.15 時間：1:00pm - 5:00pm 時數：4小時	HK\$360	4	4 non-core	4	Management & Soft Skills
PE4200074	家庭法 (理財策劃師須知) Family Laws for Financial Planners 日期：13.3.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Investment & Financial Planning
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：13.3.15 時間：2:00pm - 5:00pm 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：14.3.15 時間：9:00am - 12:00pm 時數：3小時	HK\$270	3	3 non-core	3	General Insurance
SC-2077-12	危機管理 - 危機有常？無常？ 日期：14.3.15 時間：10:00am - 1:00pm 時數：3小時	HK\$270	3	3 non-core	3	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：14.3.15 時間：12:15pm - 2:15pm 時數：2小時	HK\$180	2	2 non-core	2	General Insurance
173I3	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 日期：14.3.15 時間：1:30pm - 6:30pm 時數：5小時	HK\$450	-	5 non-core	5	General 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：16.3.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Investment & Financial Planning

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

These programmes contain no contents on construction insurance.

中 中文教材 Chinese materials ▲ Subject to HKCAAVQ approval

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
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：16.3.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
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：17.3.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
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：17.3.15 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
145I2	索償概論 Introduction to Claims 日期：17.3.15 & 18.3.15 時間：6:30pm - 9:00pm 時數：5小時（共2堂）	HK\$450	-	5 non-core	5	Law & Compliance
717E2	高效授權 Successful Delegation 日期：17.3.15 時間：6:45pm - 9:45pm 時數：3小時	中 HK\$270	3	3 non-core	3	Management & Soft Skills
148I3	保險相關刑事法律 Criminal Law Relating to Insurance 日期：17.3.15 & 24.3.15 時間：6:30pm - 9:00pm 時數：5小時（共2堂）	HK\$450	-	5 non-core	5	General Insurance
261I2	僱員補償保險 Employees' Compensation Insurance 日期：18.3.15 時間：9:30am - 4:45pm 時數：6小時（12:30-1:45午膳）	HK\$540	-	6 non-core	6	General Insurance
SC-2078-12	危機管理 - 避戰・備戰：自我認識及管理 日期：18.3.15 時間：10:00am - 1:00pm 時數：3小時	中 HK\$270	3	3 non-core	3	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：18.3.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills

中 中文教材 Chinese materials

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400E2	加強對強積金中介人的規管 (1小時) Enhanced Regulation of MPF Intermediaries 日期：18.3.15 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：18.3.15 時間：7:30pm - 8:30pm 時數：1小時	❖				
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：18.3.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
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：18.3.15 & 19.3.15 時間：6:30pm - 9:30pm 時數：6小時 (共2堂)	HK\$540	6	6 non-core	6	Management & Soft Skills
851E2	保單草擬及承保 Insurance Policy Drafting and Underwriting 日期：19.3.15 時間：2:30pm - 5:30pm 時數：3小時	HK\$270	-	3 non-core	3	General Insurance
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：19.3.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills
306E2	保險業客戶關係管理 - 理論與實踐 Applying CRM Concepts in Insurance Industry 日期：20.3.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
704E3	法律責任證書課程第四單元 - 僱主責任及汽車責任 Certificate Course in Legal Liability Part IV – Employer's Liability and Motor Liability 日期：20.3.15 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：20.3.15 時間：1:30pm - 5:30pm 時數：4小時	HK\$360	4	4 non-core	4	Management & Soft Skills
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：21.3.15 時間：9:00am - 11:00am 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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804E2	激勵人才與績效提升 Motivating People for Peak Performance 日期：21.3.15 時間：9:00am - 2:00pm 時數：5小時	中 HK\$450	5	5 non-core	5	Management & Soft Skills
286E3	瞭解建築險客戶 - 橋樑 Understanding Construction Insurance Clients – Bridges 日期：21.3.15 時間：1:30 pm - 6:30pm 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：23.3.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Investment & Financial Planning
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：23.3.15 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：23.3.15 & 30.3.15 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
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：24.3.15 時間：1:00pm - 4:00pm 時數：3小時	HK\$270	3	3 non-core	3	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：24.3.15 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及股票投資系列 單元二：地產股 Industry Analysis and Stock Investment Series for Insurance Practitioners Module 2: Properties and Construction 日期：24.3.15 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：24.3.15 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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中 中文教材 Chinese materials


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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：25.3.15 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	3	3 non-core	3	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：25.3.15 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：25.3.15 時間：2:00pm - 6:00pm 時數：4小時	 HK\$360	4	4 non-core	4	Management & Soft Skills
745F2	客戶投資心理理解 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：25.3.15 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：26.3.15 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：26.3.15 時間：6:30pm - 8:30pm 時數：2小時	HK\$180	2	2 non-core	2	General Insurance
748E2	旅遊保險 (經濟權益) Travel Insurance (Pecuniary Interests) 日期：26.3.15 時間：6:45pm - 9:45pm 時數：3小時	 HK\$270	-	3 non-core	3	General Insurance
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：27.3.15 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：27.3.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Investment & Financial Planning

 中文教材 Chinese materials

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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：27.3.15 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	3	3 non-core	3	General 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：27.3.15 時間：5:30pm - 9:30pm 時數：4小時	HK\$360	4	4 non-core	4	General Insurance
SC-2063-11	說服技巧（金融服務業專才）單元四：轉化成為超卓的說服者 Persuasion Skills for Financial Professionals Module 4: Transform You to Become a Powerful Persuader 日期：28.3.15 時間：9:00am - 12:00pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills
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：28.3.15 時間：9:00am - 12:00pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills
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：28.3.15 時間：12:15pm - 2:15pm 時數：2小時	HK\$180	2	2 non-core	2	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：30.3.15 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：30.3.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	General Insurance
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：30.3.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
PE4200078	企業管治 Corporate Governance 日期：31.3.15 時間：1:15pm - 6:15pm 時數：5小時	NEW PIBA CPD*   HK\$450	5	5 non-core	5	Management & Soft Skills

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 Taught in Cantonese supplemented with English terminology

 English materials

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SC-2085-12	<p>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</p> <p>日期：31.3.15 時間：2:00pm - 6:00pm 時數：4小時</p>	HK\$360	4	4 non-core	4	General Insurance
SC-2070-11	<p>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</p> <p>日期：31.3.15 時間：6:30pm - 9:30pm 時數：3小時</p>	HK\$270	3	3 non-core	3	Management & Soft Skills
296E2	<p>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</p> <p>日期：1.4.15 時間：1:00pm - 5:00pm 時數：4小時</p>	HK\$360	4	4 non-core	4	Management & Soft Skills
SC-2066-11	<p>「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</p> <p>日期：1.4.15 時間：2:00pm - 6:00pm 時數：4小時</p>	HK\$360	4	4 non-core	4	General Insurance
PE4200069	<p>強積金與香港退休需要 NEW 中 MPF & HK Retirement Needs</p> <p>日期：1.4.15 時間：6:30pm - 8:30pm 時數：2小時</p>	HK\$285	2	2 core	2	MPF & Others
394E2	<p>“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</p> <p>日期：2.4.15 時間：1:00pm - 6:00pm 時數：5小時</p>	HK\$450	5	5 non-core	5	Management & Soft Skills
PBA00027	<p>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</p> <p>日期：2.4.15 時間：2:00pm - 5:00pm 時數：3小時</p>	HK\$270	3	3 non-core	3	Investment & Financial Planning
728E2	<p>「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</p> <p>日期：2.4.15 時間：6:30pm - 8:30pm 時數：2小時</p>	HK\$180	2	2 non-core	2	Management & Soft Skills
724F2	<p>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</p> <p>日期：8.4.15 時間：10:00am - 1:00pm 時數：3小時</p>	HK\$270	3	3 non-core	3	Management & Soft Skills

中 Subject to MPFA's approval

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725F2	<p>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</p> <p>日期：8.4.15 時間：2:00pm - 5:00pm 時數：3小時</p>	HK\$270	3	3 non-core	3	Management & Soft Skills
PBA00018	<p>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</p> <p>日期：8.4.15 & 10.4.15 時間：6:30pm - 9:30pm 時數：6小時（共2堂）</p>	HK\$540	6	6 non-core	6	Investment & Financial Planning
PBA00024	<p>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</p> <p>日期：9.4.15 時間：1:00pm - 6:00pm 時數：5小時</p>	HK\$450	5	5 non-core	5	General Insurance
395E2	<p>“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</p> <p>日期：9.4.15 時間：1:00pm - 6:00pm 時數：5小時</p>	HK\$450	5	5 non-core	5	Management & Soft Skills
741F2	<p>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</p> <p>日期：10.4.15 時間：1:00pm - 6:00pm 時數：5小時</p>	HK\$450	5	5 non-core	5	Management & Soft Skills
SC-1762-09	<p>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</p> <p>日期：10.4.15 時間：1:00pm - 6:00pm 時數：5小時</p>	HK\$450	5	5 non-core	5	Management & Soft Skills
758F2	<p>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</p> <p>日期：11.4.15 時間：9:00am - 11:00am 時數：2小時</p>	HK\$180	2	2 non-core	2	General Insurance
PBA00045	<p>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)</p> <p>日期：11.4.15 時間：9:00am - 11:00am 時數：2小時</p>	HK\$180	2	2 non-core	2	Management & Soft Skills

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-2062-11	<p>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</p> <p>日期：11.4.15 時間：9:00am - 2:00pm 時數：5小時</p>	HK\$450	5	5 non-core	5	Management & Soft Skills
PBA00046	<p>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</p> <p>日期：11.4.15 時間：11:15am - 1:15pm 時數：2小時</p>	HK\$180	2	2 non-core	2	Management & Soft Skills
759F2	<p>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</p> <p>日期：11.4.15 時間：11:15am - 1:15pm 時數：2小時</p>	HK\$180	2	2 non-core	2	General Insurance
612F3	<p>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)</p> <p>日期：13.4.15 時間：1:00pm - 6:00pm 時數：5小時</p>	HK\$450	5	5 non-core	5	Investment & Financial Planning
274E2	<p>資產保障相關法律 - 信託 Law Relating to Asset Protection - Trusts</p> <p>日期：13.4.15 時間：1:00pm - 6:00pm 時數：5小時</p>	HK\$450	5	5 non-core	5	Investment & Financial Planning
SC-1890-10	<p>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</p> <p>日期：14.4.15 時間：1:00pm - 5:00pm 時數：4小時</p>	HK\$360	4	4 non-core	4	Management & Soft Skills
608F2	<p>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</p> <p>日期：14.4.15 時間：6:30pm - 9:30pm 時數：3小時</p>	HK\$270	3	3 non-core	3	Investment & Financial Planning
PBA00025	<p>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</p> <p>日期：14.4.15 時間：6:30pm - 9:30pm 時數：3小時</p>	HK\$270	3	3 non-core	3	General Insurance
747E2	<p>旅遊保險 (財產) Travel Insurance (Property)</p> <p>日期：14.4.15 時間：6:45pm - 9:45pm 時數：3小時</p>	 HK\$270	-	3 non-core	3	General Insurance

 中文教材 Chinese materials

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733F2	<p>互聯網時代的商機和人事 (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</p> <p>日期：15.4.15 時間：1:00pm - 5:00pm 時數：4小時</p>	HK\$360	4	4 non-core	4	Management & Soft Skills
PE4200033	<p>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</p> <p>日期：15.4.15 時間：2:00pm - 5:00pm 時數：3小時</p>	HK\$270	-	3 non-core	3	Life & Health Insurance
PE4200077	<p>Retirement Products  PIBA CPD* </p> <p>Date: 15.4.15 Time: 2:15pm - 6:15pm Duration: 4 hours</p>	HK\$360	4	4 non-core	4	Life & Health Insurance
453D2	<p>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</p> <p>日期：15.4.15 時間：6:30pm - 9:30pm 時數：3小時</p>	HK\$270	3	3 non-core	3	Investment & Financial Planning
PE4200070	<p>財富管理 - 單元一：滬港通最新發展  ▲ Wealth Management – Module 1: The Shanghai-Hong Kong Stock Connect Recent Development</p> <p>日期：16.4.15 時間：9:30am - 12:30pm 時數：3小時</p>	HK\$270	3	3 non-core	3	Investment & Financial Planning
PE4200058	<p>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</p> <p>日期：16.4.15 時間：1:00pm - 3:00pm 時數：2小時</p>	HK\$180	2	2 non-core	2	Investment & Financial Planning
303E2	<p>保險業客戶關係管理 - 創造忠實客戶 Creating Loyal Customers in Insurance Industry through CRM</p> <p>日期：16.4.15 時間：1:00pm - 6:00pm 時數：5小時</p>	HK\$450	5	5 non-core	5	Management & Soft Skills
PE4200072	<p>財富管理 - 單元三：滬港通的風險管理  ▲ Wealth Management – Module 3: Risk Management in The Shanghai-Hong Kong Stock Connect</p> <p>日期：16.4.15 時間：2:00pm - 5:00pm 時數：3小時</p>	HK\$270	3	3 non-core	3	Investment & Financial Planning
224C2	<p>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</p> <p>日期：16.4.15 時間：2:00pm - 6:00pm 時數：4小時</p>	HK\$360	4	4 non-core	4	Management & Soft Skills

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 Taught in English

▲ Subject to HKCAAVQ approval

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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：16.4.15 時間：3:00pm - 6:00pm 時數：3小時	HK\$270	3	3 non-core	3	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：16.4.15 時間：6:30pm - 8:30pm 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
PE4200071	財富管理 - 單元二：滬港通概況 ▲ NEW ▲ Wealth Management – Module 2: The Shanghai-Hong Kong Stock Connect Overview 日期：16.4.15 時間：6:30pm - 8:30pm 時數：2小時	HK\$180	2	2 non-core	2	Investment & Financial Planning
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：16.4.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$330	3	3 non-core	3	General Insurance
162I2	銷售人壽保險的法律須知 Legal Knowledge for Life Insurance Selling 日期：17.4.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	-	5 non-core	5	Life & Health Insurance
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：17.4.15 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：17.4.15 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：18.4.15 時間：9:00am - 12:00pm 時數：3小時	HK\$270	3	3 non-core	3	General Insurance

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287E3	瞭解建築險客戶 - 特殊危險 Understanding Construction Insurance Clients - Special Hazards 日期：18.4.15 時間：1:30pm - 6:30pm 時數：5小時	# HK\$450	-	5 non-core	5	General Insurance
412B2	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 日期：20.4.15 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：20.4.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
PBA00021	變革管理必技巧 單元三：持分者管理 Essential Skills for Change Management Module 3: Stakeholder Management 日期：20.4.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Management & Soft Skills
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：20.4.15 時間：6:45am - 9:45pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
PE4200036	投資策劃 (常犯投資錯誤) Investment Planning (Common Mistakes in Investing) 日期：20.4.15 & 27.4.15 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
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：21.4.15 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
PE4200069	強積金與香港退休需要 MPF & HK Retirement Needs 日期：21.4.15 時間：6:30pm - 8:30pm 時數：2小時	NEW 中 HK\$285	2	2 core	2	MPF & Others
860E2	網絡保險 Cyber Insurance 日期：21.4.15 時間：6:45pm - 9:45pm 時數：3小時	HK\$270	-	3 non-core	3	General Insurance

These programmes contain no contents on construction insurance.

中 中文教材 Chinese materials

中 Subject to MPFA's approval

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734F2	<p>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</p> <p>日期：22.4.15 時間：1:00pm - 5:00pm 時數：4小時</p>	HK\$360	4	4 non-core	4	Management & Soft Skills
SC-2071-11	<p>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</p> <p>日期：22.4.15 時間：1:00pm - 6:00pm 時數：5小時</p>	HK\$450	5	5 non-core	5	Management & Soft Skills
273I2	<p>中港保險法比較  A Comparison of Insurance Law between China & Hong Kong</p> <p>日期：22.4.15 時間：1:15pm - 6:15pm 時數：5小時</p>	HK\$450	5	5 non-core	5	Law & Compliance
445E2	<p>醫療開支與保險市場 Medical Expenses and the Insurance Market</p> <p>日期：22.4.15 時間：2:00pm - 5:00pm 時數：3小時</p>	HK\$270	-	3 non-core	3	Life & Health Insurance
760F2	<p>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</p> <p>日期：22.4.15 時間：6:30pm - 9:30pm 時數：3小時</p>	HK\$270	3	3 non-core	3	General Insurance
PBA00052	<p>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</p> <p>日期：23.4.15 時間：9:30am - 12:30pm 時數：3小時</p>	HK\$270	3	3 non-core	3	Investment & Financial Planning
722F2	<p>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</p> <p>日期：23.4.15 時間：1:00pm - 4:00pm 時數：3小時</p>	HK\$270	3	3 non-core	3	Law & Compliance
PBA00053	<p>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</p> <p>日期：23.4.15 時間：2:00pm - 5:00pm 時數：3小時</p>	HK\$270	3	3 non-core	3	Investment & Financial Planning
723F2	<p>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</p> <p>日期：23.4.15 時間：4:15pm - 6:15pm 時數：2小時</p>	HK\$180	2	2 non-core	2	Law & Compliance

 中文教材 Chinese materials

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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：23.4.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
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：23.4.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
272I1	保險相關普通法原則 Common Law Principles of Insurance 日期：23.4.15 & 30.4.15 時間：6:30pm - 9:00pm 時數：5小時（共2堂）	HK\$450	-	5 non-core	5	General Insurance
271I1	適用於人壽保險的法律原則 Legal Principles Applicable to Life Insurance 日期：24.4.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	-	5 non-core	5	Life & Health Insurance
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：24.4.15 時間：2:00pm - 6:00pm 時數：4小時	HK\$360	4	4 non-core	4	Management & Soft Skills
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：24.4.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
806E2	團隊溝通及衝突管理 Building Team Communication & Resolving Conflict 日期：25.4.15 時間：9:00am - 2:00pm 時數：5小時	 HK\$450	5	5 non-core	5	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：25.4.15 時間：9:30am - 11:30am 時數：2小時	HK\$180	2	2 non-core	2	Management & Soft Skills
288E3	瞭解建築險客戶 - 多層高樓 Understanding Construction Insurance Clients - High-rise Buildings 日期：25.4.15 時間：1:30pm - 6:30pm 時數：5小時	[#] HK\$450	-	5 non-core	5	General Insurance

 中文教材 Chinese materials

[#] These programmes contain no contents on construction insurance.

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PE4200079	香港銀行保險市場概覽 Hong Kong Bancassurance Market Review 日期：27.4.15 時間：6:30pm - 9:30pm 時數：3小時	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：27.4.15 時間：6:45pm - 9:45pm 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：27.4.15 & 28.4.15 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：28.4.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
701E3	法律責任證書課程第一單元 - 疏忽及因他人作為的責任 Certificate Course in Legal Liability Part I - Negligence and Vicarious Liability Date : 28.4.15 Time : 1:15pm - 6:15pm Duration : 5 hours	HK\$450	5	5 non-core	5	Law & Compliance
749E2	旅遊保險（法律責任） Travel Insurance (Legal Liability) 日期：28.4.15 時間：6:45pm - 9:45pm 時數：3小時	HK\$270	-	3 non-core	3	General Insurance
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：29.4.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	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：29.4.15 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	-	3 non-core	3	Life & Health Insurance
396E2	強積金最新發展 MPF Recent Development 日期：29.4.15 時間：6:30pm - 8:30pm 時數：2小時	HK\$285	2	2 core	2	MPF & Others

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中 Taught in Cantonese supplemented with English terminology

EN English materials

中 中文教材 Chinese materials

EN Taught in English

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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：29.4.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
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：29.4.15 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：30.4.15 時間：9:30am - 12:30pm 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：30.4.15 時間：1:00pm - 6:00pm 時數：5小時	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：30.4.15 時間：1:00pm - 6:00pm 時數：5小時	HK\$450	5	5 non-core	5	Management & Soft Skills
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：30.4.15 時間：2:00pm - 5:00pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning
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：30.4.15 時間：2:00pm - 6:00pm 時數：4小時	中 HK\$360	4	4 non-core	4	Management & Soft Skills
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：30.4.15 時間：6:30pm - 9:30pm 時數：3小時	HK\$270	3	3 non-core	3	Investment & Financial Planning

中 中文教材 Chinese materials

Programme Administration Guidelines 課程管理指引

Enrollment 課程報名

- Please use the specified enrollment form and follow the “Notes to Applicants” in the form to apply for programmes.
- Applicants should show the Hong Kong Identity (HKID) Card / Passport / Travel Document / or valid study visa issued by the Immigration Department of the Hong Kong Special Administrative Region (HKSAR) for enrollment.
- Individual programmes may have specific admission requirements. Applicants should refer to the admission requirements of the individual 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。
- 申請人於報名時必須出示由香港特別行政區（香港特區）入境事務處所簽發的香港身份證 / 護照 / 旅行證件、或有效的來港就讀簽證。
- 各個課程之入學條件有別，申請人在報讀時必須依從個別課程之入學條件作出申請。
- 所有課程名額均以先到先得方法分配，任何未填妥之表格，或學生未有附上學費的報名表，本院將不會處理。

Deadline for Application 截止報名日期

The deadline for application is 7 working days^{**} 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^{**}（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.

成功申請人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，申請人可致電本院查詢（電話：2836 1906）。

Programme Fees / Receipt 學費 / 收據

For a programme commencing within 7 working days^{**} at the time of enrollment, students 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.

Students will collect and sign to acknowledge collection of the receipts 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 during the first lesson, our staff will contact them for the receipt collection arrangement. If students choose to collect the receipt by mail, PEAK will not be responsible for any loss in mailing. Students will be required to pay an administrative charge of HK\$100 for their requests for each additional receipt copy. Please send crossed cheque payable to “Vocational Training Council” with a written application to “The Programme Team” of the Institute. For enquiry, please contact us at 2836 1862.

如學生所報讀的課程將在報名當日起計7個工作天^{**}內開課，學生必須以現金繳交學費。

除學生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。

學生需於第一堂簽收收據，若學生於報名截止日後繳費，收據或會稍遲發出。本院會通知未簽收收據之學生領取收據的安排或將收據郵寄予學生。如學生要求以郵寄方式收取收據，本院對郵遞失誤概不負責。學生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。學生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 Professional Certificate, Professional Diploma, 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、專業證書、專業文憑及學位課程外，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

Students 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 student is strictly prohibited. If found, PEAK has the right to terminate the study of such student and the fees paid will not be refunded. **For Continuing Professional Development (CPD) programmes, the CPD / CPT credits of students who are late for class will be deducted on a pro-rata basis.** PEAK has the right to ask the students to present the valid identification documentations (HKID Card / Passport / Travel Document / Study visa issued by the Immigration Department of HKSAR) for identity verification purpose. In particular, CPD Students should read and observe the “CPD Programme – Notes to Students” carefully.

學生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。學生不可代他人點名，如被發現，本院有權終止該學生之學籍，所繳款項亦概不發還。**凡報讀持續專業發展課程（CPD課程）而遲到之學生，其CPD / CPT分數將按比例扣減。**本院有權要求學生出示有效身份證明文件（由香港特區入境事務處所簽發的香港身份證 / 護照 / 旅行證件、或來港就讀簽證）以核實身份。此外，**持續專業發展課程**之學生亦應特別注意及遵守指引內的「**持續專業發展課程—學生須知**」。

^{**} Working days (exclusive of Saturdays and Sundays) ^{**} 工作天（不包括星期六及星期日）

CPD Programme - Notes to Students 「持續專業發展課程 - 學生須知」

- Students of Continuing Professional Development (CPD) programmes are required to sign in and out on the attendance sheet for every single class. CPD / CPT credits will be given to students according to the attendance record. Students 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) 課程之學生，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。學生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。

- Students who are late for a CPD 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 students who are late for class will be deducted on a pro-rata basis.

學生若因事遲到，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，本院將按學生遲到的時間扣減CPD / CPT分數。

- CPD / CPT credits for students 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 students 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.

學生可獲的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。

- Students will not be given any MPFA and SFC credits if they are late for or absent from the class in total for MORE than the specified time shown in the following table.

學生若遲到或離開課室合共超過下列時數，將不能獲得任何MPFA及SFC分數。

Duration of Programme (Hour(s)) 課程時數	No MPFA and SFC credits will be given if students are late for or absent from the class for more than the specified time below 若遲到或離開課室超過下列時數，將不能獲得任何MPFA及SFC分數
1	15 minutes / 15 分鐘
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 hours* / 2 小時*

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

*註：若有關課程分兩節課堂舉行，本院將按學生於兩節課堂的總出席時數計算MPFA及SFC分數。

- CPD / CPT credits of any student will be deducted on a pro-rata basis if he / she absent from the class in total for more than 10 minutes. 若學生在上課期間離開課室合共超過10分鐘，CPD / CPT分數將按比例被扣減。

- Students will not be given any CPD / CPT 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.

若學生遲到或離開課室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CPD / CPT分數。

- Students 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生出席時數。

- No eating or drinking is allowed in classrooms.

課室內不准飲食。

Certificate 證書頒發

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

- Students enroll in a programme in less than 3 working days** before the class commencement date; and / or
- Students are late for or absent from (including leaving the class before it ends) Continuing Professional Development (CPD) 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 students for the collection arrangement. If students choose to collect the certificate by mail, PEAK will not be responsible for any loss in mailing. Students who lost their certificate and would like PEAK to reissue a certificate to them 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%*的短期課程學生將獲發出證書。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出予學生：

- 學生於開課日前少於3個工作天**報名；及 / 或
- 學生於持續專業發展課程 (CPD課程) 的課堂遲到、早退或中途離開課室超過10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，並會通知學生領取證書的安排。如學生選擇以郵寄方式收取證書，本院對郵遞失誤概不負責。如學生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。

** Working days (exclusive of Saturdays and Sundays) ** 工作天（不包括星期六及星期日）

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 "Home>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 us 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)，學生可到網頁 (位置：「主頁」>「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。如有學生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 relating to administrative 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 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 Website to obtain the latest information on the discounted programmes 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

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

Suggestions and Complaints 建議及投訴

PEAK is very keen to receive feedback from students on all aspects of the Institute. If students 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生對學院各方面的意見。如學生對學院事務有任何建議或投訴，可向課程小組主任提出。學生如需更多詳情可於辦公時間**內致電2836 1922。



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 CEF reimbursable course (the Course) or module(s) forming part of the Course. The fees for more than one CEF reimbursable course 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或瀏覽持續進修基金網頁：www.sfaa.gov.hk/cef。

Application Procedures 申請手續

- Application forms can be obtained from the Office of the Continuing Education Fund (OCEF) 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）。
- Applicants should submit the completed and certified application forms, together with photocopies of Hong Kong Identity (HKID) Card, to OCEF **before** the commencement of the Course. 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，連同香港身份證副本，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。
- Applicants can bring the application forms to the Reception Counter of PEAK for certification during the opening hours**.
申請人可於辦公時間**將申請表交予本院蓋章。

How to Claim Reimbursement 申請發還款項手續

- Each successful applicant will be provided by OCEF a "Reimbursement Claim Form (RCF)" which should be submitted after successful completion of the Course(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。
- "Successful completion" of the Course means that claimants must pass the course assessment(s) and fulfill the attendance requirement as required by the course provider. Each course provider would have its own method of assessing successful completion of the Course. Please refer to the relevant programme brochures. **Please be reminded that reimbursement can only be claimed upon completion of the Course. Completion of an individual module which is not 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院校 / 辦學機構規定的課程評核和出席要求。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。
- Claimants should submit the completed RCF with the following documents (Original Copies) to PEAK for certification.
 - Original copy(ies) of the VTC Official Receipt(s);
 - Original copy(ies) of the documentary proof of successful completion of the Course:
 - Attendance Certificate; and / or
 - Completion Certificate; and / or
 - Letters or Transcripts certifying the claimant has passed the relevant course assessment(s)申領發還學費的人士（申領人）須填妥申領表格並連同以下文件（正本）交回本院以作核實：
 - 學費收據正本；
 - 成功修畢課程的證明文件正本：
 - 出席證書 及 / 或
 - 結業證明書 及 / 或
 - 由本院發出的信件或成績單等
- If the claimant is proved to have successfully completed the Course, PEAK will do the document certification and issue a "Letter of Certification" to the claimant within 7 working days** after all required documents are received. Our staff will then contact the respective claimant for the collection arrangement. **If the claimant fails to submit any of the above documents, PEAK will NOT stamp on the RCF and issue the "Letter of Certification".**
如確認申領人成功修畢課程，本院會於申領人提交上述文件後的7個工作天**內核實所有提交的文件及向申領人發出「證明信件」，並會通知有關申領人前來領取。如申領人未能出示上述文件，本院有權拒絕於申請表上蓋章及發出「證明信件」。
- Please refer to CEF information to submit the 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。

** Working days (exclusive of Saturdays and Sundays) ** 工作天（不包括星期六及星期日）

報名表

本院專用 Office use only ver 20141209

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: _____ 流動電話: _____ 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 / 證書課程申請人填寫)

單元編號	單元名稱	開課日期

學歷 (請附上學歷證明文件副本)

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份申請入讀課程, 請在方格內加上 " " 號。

就業詳情 (如適用, 請列出與本課程有關的就業詳情, 並提供相關的就業證明副本及僱主推薦信副本。如空位不敷填寫, 申請人應另頁詳列有關資料。)

機構名稱	日期 (月/年): 由/至	職位	全職/兼職

付款方法


如報讀之課程在報名當日起7個工作天內 (不包括星期六及星期日) 開課, 申請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)

持續進修基金

☐ 申請持續進修基金* (請連同持續進修基金申請表及由香港特別行政區 (香港特區) 入境事務處所簽發的香港身份證副本於開課前最少10個工作天 (不包括星期六及星期日) 交回本院代辦手續, 逾期遞交恕不受理)

☐ 已申請 / 不申請*

* 請細閱「課程管理指引」內有關持續進修基金申請手續的詳細資料。

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 (如: 更改上課時間)。如申請人未有提供電郵地址, 本院將以電話聯絡。

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、流動電話號碼、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、流動電話號碼、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

- 申請人必須就每項課程填寫一份報名表 (表格), 如有需要可自行影印。
- 申請人於報名時必須出示由香港特區入境事務處所簽發的香港身份證 / 護照 / 旅行證件, 或有效的來港就讀簽證。
- 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。
- 如申請人選擇以郵寄或傳真方式交回表格及課程費用, 請致電2836 1906以確認本院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, 或未有附上學費的表格, 本院將不會處理。
- 申請人 / 學生必須細閱及遵守載列於本院課程手冊內之「課程管理指引」(指引), 報讀持續專業發展課程之學生也必須注意及遵守指引內的「持續專業發展課程—學生須知」中有關IA, SFC及MPFA分數的計算方式。申請人 / 學生亦可向本院辦事處索取或從本院網站下載指引。

聲明

- 本人聲明於本表格所提供資料均屬真確, 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持續專業發展課程時, 查閱本人之有效身份證明文件 (由香港特區入境事務處所簽發的香港身份證 / 護照 / 旅行證件, 或來港就讀簽證) 以核實身份。
- 本人明白並會儘量填寫足夠資料, 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計算本人就該課程出席時數及所獲得的CPD / CPT分數。並同意「報名須知」第6項有關IA, SFC及MPFA分數的計算方式。
- 除本人之申請不獲接納或所選的課程取消 / 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。

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 20141209

Received Date: _____ Handled by: _____

Remarks: _____

Application: ☐ Walk-in ☐ By Mail ☐ By Fax
Payment: ☐ Cash ☐ Cheque ☐ Credit Card

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

Name (English) : Mr./Ms./Miss (Surname) _____ (Given Name) _____ (Chinese) : _____ 先生 / 女士 / 小姐

Hong Kong Identity Card Number : _____ Date of Birth: (dd/mm/yyyy) _____

Mailing Address : _____

Company of Employment : _____ Position / Department : _____

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

Daytime Contact Telephone Number : _____ Mobile Phone Number : _____ 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 / Title: _____ Commencement Date (dd/mm/yyyy) : ____ / ____ / ____

FOR AWARD-BEARING PROGRAMMES APPLICANTS ONLY

Module Code	Module Name	Commencement Date

Academic Attainment * (Please attach copies of academic qualifications)

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

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

Employment Record

If applicable, please provide the information relevant to the programme(s) you are applying for. Copies of employment proofs and job reference letters from employers should be submitted together with the application. If there is insufficient space on this form, please give details on a separate sheet.)

Company Name	Date (Month / Year)	Position Held	Full time / Part time

PAYMENT METHOD

For a programme commencing within 7 working days (exclusive of Saturdays and Sundays) at the time of enrollment, applicants 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: _____ 

(mm/yy)

Cardholder's Name

Authorised Signature

CONTINUING EDUCATION FUND (CEF)

☐ Apply for CEF* (Please submit with CEF application form and copy of Hong Kong Identity (HKID) Card issued by the Immigration Department of the Hong Kong Special Administrative Region (HKSAR) at least 10 working days (exclusive of Saturdays and Sundays) before commencement of course. No late submission will be accepted)

☐ CEF Applied / Not applying CEF*

* Please read the "Application Procedures" under "Continuing Education Fund" stipulated in Programme Administration Guidelines for details.

Where did you learn about this programme?

☐ Yahoo ☐ Google ☐ PEAK Website ☐ Email ☐ Leaflet

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

☐ Education Expo

☐ Other _____

CONTACT METHOD

For all further notice (e.g. rescheduling of classes), we will contact you by email. Applicants without email accounts will be contacted by phone.

USE OF PERSONAL DATA

☐ I agree that my personal data provided, including my name, phone number, mobile phone 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 phone number, email address, correspondence address and education level to peak@vtc.edu.hk or by fax to 2891 5707.)

NOTES TO APPLICANTS

- Applicants should complete one enrollment form (the Form) for each programme and photocopy the Form if necessary.
- Applicants should show HKID Card / Passport / Travel Document / or valid study visa issued by the Immigration Department of the HKSAR for enrollment.
- 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 programme) payable to "Vocational Training Council". If you pay the programme fees by credit card, please return the Form to us by fax / mail / in person (Fax no.: 2891 5707 / Address: PEAK, 9/F, VTC Tower, 27 Wood Road, Wanchai, Hong Kong).
- If you choose to return the Form and cheque payment to PEAK by fax or 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 not be processed.
- Applicants / Students must read carefully and observe the Programme Administration Guidelines (the Guidelines) stipulated in PEAK's Programme Prospectus. In particular, students of Continuing Professional Development (CPD) programmes should read & comply with the circumstance defined for the calculation of IA, SFC and MPFA credits as indicated in the "CPD Programme - Notes to Students" in the Guidelines. The Guidelines are also available from PEAK Office and on PEAK Website.

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 valid identification documents (HKID card / Passport / Travel Document / Study visa issued by the Immigration Department of HKSAR) for identity verification purpose while I am participating in Continuing Professional Development (CPD) programmes and award-bearing programmes.
- 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 calculate my attendance hours and CPD / CPT credits of a programme according to PEAK's clocks. I also agree to Point 6 of the "Notes to Applicants" which defines the circumstance for calculating IA, SFC and MPFA credits.
- The programme fees paid are non-refundable, except for the cases of unsuccessful applications and programme cancellation or rescheduling. 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 the "Programme Administration Guidelines", "Notes to Applicants", and "Declaration", and PEAK's policy on the use of 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 will be used for the following purposes:
 - for processing and selection of applications for admission to PEAK/VTC programme; and related purposes;
 - for obtaining the HKCEE/HKALE results 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 checking of application records, checking and obtaining the study records and records of examination results attained in the programme provided by member institutions under the VTC;
 - for storage of information on the successful applicants in the Students Records System; and
 - if applicant indicated his/her wish to receive PEAK information, the application data will be retained for such purpose.
 - 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.
 - 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 for 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.
- 申請人所填報的入學申請資料，會用於：
 - 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香港中學會考/香港高級會考成績，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；
 - 核對申請人申請紀錄，以及核對和索取申請人在職業訓練局轄下院校及中心就讀的紀錄與成績；
 - 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，則申請資料將被保留作有關用途。
 - 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。
 - 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 programme offered by PEAK.
 - I authorize 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 authorize PEAK to use my data to carry out checks on any applications for admission to programme 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 in the application will lead to **DISQUALIFICATION** without notice and cancellation of any resulting registration. 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學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。
 - 本人明白在申請中提供任何虛假或誤導性資料會導致即時取消入學資格，已繳費用概不會退還。

www.peak.edu.hk

Hotline熱線：2836 1922

Fax傳真：2891 5707

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