Financial Services and Insurance 金融服務和保險

Postgraduate Certificate in Management and Insurance

Application Code: 2245-AC123A

2867 8474

pgdipmi@hkuspace.hku.hk

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The Postgraduate Certificate in Management and Insurance programme is designed to provide students with a broad understanding of risk and insurance. Upon completion of the programme, students are equipped with knowledge in the insurance industry and to develop professional competencies needed to be a leader in the field. The curriculum is designed based on the Specification of Competency Standards (SCSs) of the Insurance Industry in Hong Kong. The programme adopts a practical approach, equipping students with the appropriate level of skills to address the managerial and risk management aspects in the insurance industry under an increasingly stringent regulatory environment.

Applicants shall:

a) hold a bachelor's degree awarded by a recognized institution or

lb) a recognized professional qualification plus five years of full-time work experience at senior managerial level in related industries

- II) provide evidence of English proficiency (if the degree or equivalent qualification is from an institution where the language of teaching and assessment is not English) such as: an overall band of 6.0 or above with no subtests lower than 5.5 in the IELTS; or
 - a score of 550 or above in the paper-based TOEFL, or a score of 213 or above in the ii. computer-based TOFFL, or a score of 80 or above in the internet-based TOFFL; or
 - iii. HKALE Use of English at Grade E or above; or iv. HKDSE Examination English Language at Level 3 or above; or
 - equivalent qualifications

Applicants with other gualifications and relevant work experience will be considered on individual merit.

English

HK\$4,000

Application Fee: HK\$150

9 months to 12 months

Level 6 (Reg. No.: 23/000261/L6) Validity Period: 01 Apr 2023 - on-going

Advanced Diploma in Financial Planning

Application Code: 2265-FN005A

2867 8468

🔁 cfp@hkuspace.hku.hk

LCEF (4) 🕐

This programme prepares students for the CFP® Certification Examination (Foundation Level) and CFP® Certification Examination (Advanced Level Paper 1 and Advanced Level Paper 2) organized by the Institute of Financial Planners of Hong Kong. The graduates of Advanced Diploma can further articulate to Degree programmes. Besides, degree holders can further their studies in finance postgraduate programmes (e.g., Postgraduate Diploma in Investment Management, Postgraduate Diploma in Investment Management and Financial Intelligence, Postgraduate Diploma in Finance and Data Analytics, Postgraduate Diploma in FinTech and Legal Regulations, and Postgraduate Diploma in Financial Analytics and Algo Trading).

Applicants should

- have gained in the HKCEE Grade E in 3 subjects and Level 2 in Chinese Language and English Language; OR
- have gained in the HKDSE Level 2 in 5 subjects;
- be aged 21 years of age or above and have 3 years of work experience
- IFPHK candidacy is a pre-requisite for the Advanced Diploma in Financial Planning Programme

Tenglish

- **Please upload copy of HKID and complete Employment Information while applying online. Business modules HK\$4.200 - HK\$6.200
- AFP module: HK\$16.800 CFP level 1 & 2 modules: HK\$5,750 each module

Application Fee: HK\$150

- 1 year to 2 years
 - Level 4 (Reg. No.: 14/003649/L4) Validity Period: 01 Jan 2015 on-going

Application Code: 2135-EP1424	A 📀
2867 8476	ecmi@hkuspace.hku.hk
The programme will primarily appeal to financial services executives who wish to equip themselves with latest knowledge in marine insurance for their professional advancement. The secondary target market includes business executives or new graduates who aim to take up opportunities in insurance sector with a focus of marine insurance.	
 S HK\$9,000 Application Fee: HK\$150 D 3 months 	Reg English
Executive Workshop The Art of Winning Requests for Proposals (RFP) in Financial Services Programme Code: FINA9364	
2867 8322	
Susanna.wss.lee@hkuspace.hku.hk	
Competition of service providers in financial services has never been more brutal.	

Executive Certificate in Marine Insurance

Competition of service providers in financial services has never been more brutal. Executives of financial service providers feel increasingly commoditised as clients view themselves and their competitors as much the same. Their win rate in bidding request for proposals (RFP) may be on the decrease. One of the best ways to win RFP is to make sure they understand how and why their clients determine one competitor over another and how outstanding providers align and win the RPF without competing on fees only. How to accelerate the message of service providers with difference, preference and proof is important in winning RFP in financial services.

HK\$4,500

1 month

Certificate for Module (Certified Insurance **Professionals Induction Course)**

Application Code: 2250-AC153A

2867 8487



The programme aims to equip insurance practitioners with knowledge of insurance, financial planning and related investment products. It will also cover business ethics and regulations for insurance, financial and investment planning in Hong Kong market

- \$ HK\$8.000
- D 3 months
- Level 4 (Reg. No.: 24/000274/L4) Validity Period: 01 Mar 2024 on-going

NCR¹ NCR²

NCR³

This is an exempted course under the Non-Local Higher and Professional Education (Regulation) Ordinance. 根據《非本地高等及專業教育(規管)條例》·本課程屬獲豁免課程。 It is a matter of discretion for individual employers to recognize any qualification to which this course may lead. 個別僱主可酌情決定是否承認本課程可今學員獲取的任何資格。 These are exempted courses under the Non-Local Higher and Professional Education (Regulation) Ordinance. 根據《非本地高等及專業教育(規管)條例)·述些課程履獲給免課程。 It is a matter of discretion for individual employers to recognize any qualification to which these courses may lead. 個別僱主可酌情決定是否承認在違認機能分類 The course operator is applying for exemption under the Non-local Higher and Professional Education (Regulation) Ordinance. 課程主辦人正根據《非本地高等及專業教育(規管)條例》辦理豁免註冊手續。 It is a matter of discretion for individual employers to recognize any qualification to which this course may lead. 個別僱主可酌情決定是否承認本課程可令學員獲取的任何資格。

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Financial Services and Insurance 今副服教和保险

金融服務和保險



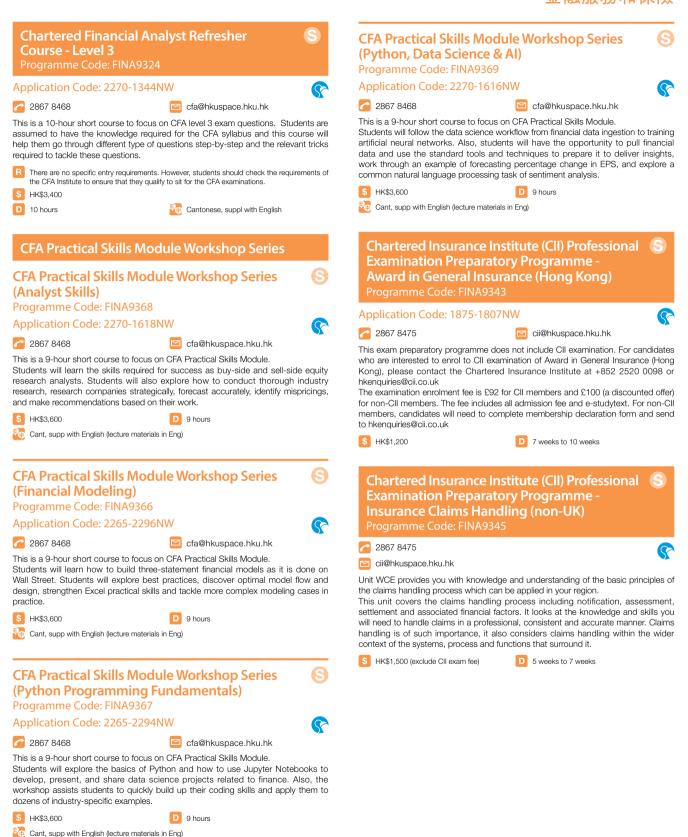
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See legend on page 031 圖像説明於第031 頁

R Minimum Entry Requirements 基本入學要求(P.017)

S Fee 學費

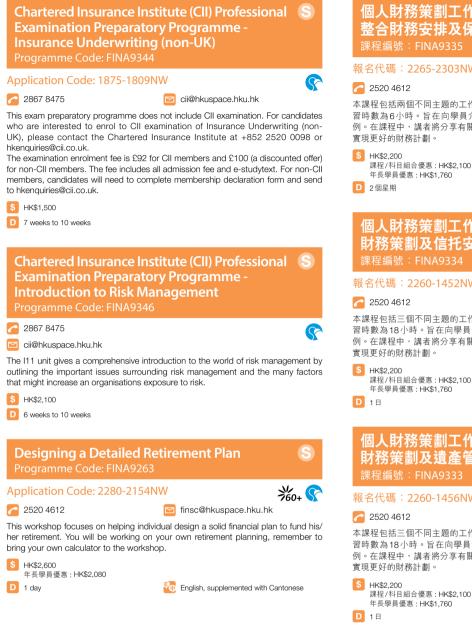
Financial Services and Insurance 金融服務和保險



NCR1
 This is an exempted course under the Non-Local Higher and Professional Education (Regulation) Ordinance. 根據(非本地高等及專業教育(規管)條例》,本課程屬獲豁免課程。
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 NCR2
 These are exempted courses under the Non-Local Higher and Professional Education (Regulation) Ordinance. 根據(非本地高等及專業教育(規管)條例》,這些課程屬獲豁免課程。
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Financial Services and Insurance 金融服務和保險





Accounting & Finance 會計及金

See legend on page 031 圖像説明於第031 頁

R Minimum Entry Requirements 基本入學要求(P.017)

S Fee 學費

😓 Medium of Instruction 教學語言 🛛 Q Qualifications Framework 資歷架構 🛛 E Exemption 豁免 🛛 S Short Course 短期課程

For more and latest programme information, please visit our website 有關最新課程資訊及詳情,請瀏覽學院網站 hkuspace.hku.hk

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