



CPD & CPT Programme Series: Banking and Financial Services

Q4 2018

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Programme Objectives & Outlines

Programme & Module	Objectives	Outlines
中國經濟及金融業務課程 (Ref. #: 80/74/20)		
經濟概覽 (HD-P18-1010) 3 Hours	<ul style="list-style-type: none"> 通過對中國經濟及其創造經濟財富的主體-企業家的認識，提升銀行同事對於中國經濟的整體瞭解，同時把握在金融危機影響下中國經濟的整體核心競爭力以及中國經濟未來十大財富新熱點，增強對內地人士、內地同行以及同事所處環境的瞭解，增加與他們進行有效溝通、交流的話題。 	<ul style="list-style-type: none"> 中國經濟形勢分析及展望 中國經濟迎接環球金融危機新挑戰 中國經濟未來新財富熱點 中國房地產市場 當前中國經濟的“熱話” 心態分析 如何提升整體對財富的認識 中國企業可持續發展方針
民生概覽 (HD-P18-1007) 3 Hours	<ul style="list-style-type: none"> 讓銀行同事比較深入地瞭解當前中國在經濟改革過程中重要的民生議題，一方面增強銀行同事對國情的瞭解，另一方面，也增加銀行同事與內地民眾及同行同事打交道時的話題與內容，增強溝通的有效性。 	<ul style="list-style-type: none"> 中國的民生熱點問題 內地人民生活文化特色 內地職場達人的特色 各大商業都市的地道文化 成功的國內商業溝通技巧 中國發展的走向及改革所伴生的問題
Wealth Management for High Net-Worth Individuals (HNWIs) (Ref. #: 80/74/28)		
Module 1: Recent Developments of Global Wealth Management Market (HD-P18-1212) PWMA OPT 3 Hours	<ul style="list-style-type: none"> Understand the recent trends and developments of the global wealth management market, especially for the High Net Worth Individual (HNWI) customers Understand the priorities for HNWIs in wealth management and increasing trends in international holdings and alternative investments will also be covered 	<ul style="list-style-type: none"> High-net-worth individuals (HNWIs) vs. Ultra high-net-worth individuals Top priorities for HNWIs in wealth management Recent trends in shifting away from wealth preservation Increases in international holdings and alternative investments by HNWIs HNWI's wealth growth in recent years
Module 2: Investment Vehicles for High Net-Worth Individuals (HD-P18-1213) PWMA OPT 3 Hours	<ul style="list-style-type: none"> Understand different kinds of common investment vehicles for High Net Worth Individual (HNWI) customers Understand different types, characteristics, risk and return profiles of these investment vehicles 	<ul style="list-style-type: none"> Money market Instruments Foreign exchange market Equity securities Debt securities Forward market instructmens Derivative securities Structured products
Module 3: Sophisticated Financial Services for High Net-Worth Individuals (HD-P18-1214) PWMA OPT 3 Hours	<ul style="list-style-type: none"> Understand the increasing demand for sophisticated financial services for the High Net Worth Individual (HNWI) customers, specifically on universal life insurance and premium financing Analyze the costs and benefits of universal life insurance and premium financing 	<ul style="list-style-type: none"> Characteristics of universal life insurance Uses of universal life insurance Types of universal life insurance Living benefits of universal life insurance Basic structure of premium financing Benefits of using premium financing Further considerations when using premium financing
Module 4: Trust Services and Wealth Succession (HD-P18-1201) PWMA OPT 3 Hours	<ul style="list-style-type: none"> Understand the increasing demand for trust services as a wealth succession solution in recent years Introduce different kinds of trusts and characteristics of trusts Illustrate the benefits of using trust services for asset protection and wealth succession 	<ul style="list-style-type: none"> Engaging the current generation and the next generation of High Net Worth Individual (HNWI) Concepts and structure of a Trust Benefits of using Trust services The operations of Trust Asset protection and wealth succession
Module 5: Practical Approach on Complied Investment and Insurance Sales Process 合規投資及保險產品銷售流程 的實務處理(HD-P18-1215) PWMA OPT 3 Hours	<ul style="list-style-type: none"> 透過個案分析及研討，加強投資及保險中介人對整個銷售流程之合規事宜 認清於合規銷售流程之應做與不應做 	<ul style="list-style-type: none"> 重溫投資及保險產品之合規事宜 銷售過程之應做與不應做 (投資及保險產品) 銷售技巧之應做與不應做 個案分析及研討
Module 6: Market Outlook: Medical Insurance 醫療保險市場之最新發展 (HD-P18-1209) PWMA OPT 3 Hours	<ul style="list-style-type: none"> 了解不同種類的醫保計劃，以及香港醫療保險的發展趨勢 為顧客提供在醫療保險方面的合適財務策劃建議 	<ul style="list-style-type: none"> 醫療保險市場發展方向 財務策劃在醫療保險的應用 理賠個案分析



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Programme Details

Language : Cantonese (supplemented with English materials)
 Date : Q4 2018
 E-mail : programme@hkib.org
 Enquiry Hotline : (852)2190 7060
 Enrollment : By fax at 2682 0218 / In person to our Institute

Venue : 3/F Guangdong Investment Tower, 148 Connaught Road Central, Sheung Wan

Special Offer : Enroll 2 or more modules in one time, enjoy a 10% discount off

Registration Form

CPD & CPT Programme Series

Programmes		Time	Course Fees (Regular Price/ Discount Price)
中國經濟及金融業務課程 (Ref.#:80/74/20)	<input type="checkbox"/> 經濟概覽 (HD-P18-1010) 3 Hours	9 Oct 2018 (Tue) 7:00pm – 10:00pm	Price for Programmes with ≥ 3 Training Hours <input type="checkbox"/> Individual Member (HK\$900 / HK\$810) x ____ Module(s) = HK\$_____ <input type="checkbox"/> Staff of Corporate Member (HK\$1,080 / HK\$970) x ____ Module(s) = HK\$_____ <input type="checkbox"/> Non-member (HK\$1,200 / HK\$1,080) x ____ Module(s) = HK\$_____
	<input type="checkbox"/> 民生概覽 (HD-P18-1007) 3 Hours	16 Oct 2018 (Tue) 7:00pm – 10:00pm	
Wealth Management for High Net-Worth Individuals (HNWIs) (Ref. #: 80/74/28)	<input type="checkbox"/> Module 1: Recent Developments of Global Wealth Management Market (HD-P18-1212) 3 Hours	7 Dec 2018 (Fri) 7:00pm – 10:00pm	
	<input type="checkbox"/> Module 2: Investment Vehicles for High Net-Worth Individuals (HD-P18-1213) 3 Hours	12 Dec 2018 (Wed) 7:00pm – 10:00pm	
	<input type="checkbox"/> Module 3: Sophisticated Financial Services for High Net-Worth Individuals (HD-P18-1214) 3 Hours	21 Dec 2018 (Fri) 7:00pm – 10:00pm	
	<input type="checkbox"/> Module 4: Trust Services and Wealth Succession (HD-P18-1201) 3 Hours	8 Dec 2018 (Sat) 2:00pm – 5:00pm	
	<input type="checkbox"/> Module 5: Practical Approach on Complied Investment and Insurance Sales Process (HD-P18-1215) 3 Hours	5 Dec 2018 (Wed) 7:00pm – 10:00pm	
<input type="checkbox"/> Module 6: Market Outlook: Medical Insurance (HD-P18-1209) 3 Hours	18 Dec 2018 (Tue) 7:00pm – 10:00pm		

Full Name : Mr / Ms _____ (In English as on ID Card) Full Name : _____ (In Chinese)

Membership No : _____ Organization : _____

Department : _____ Position : _____

E-mail : _____ Mobile / Phone No : _____

(Confirmation will be sent via e-mail one week before programme commences)

Mailing Address : _____ (Please provide a mailing address if you want to collect the programme certificate)

Payment Method : Crossed cheque made payable to **The Hong Kong Institute of Bankers** (Cheque no.: _____)
 * For e-Cheque, please state the **programme code** under 'remarks' and email together with the **completed enrolment form** to **programme@hkib.org**

Credit Card : VISA Master Amount : HK\$ _____

Cardholder's Name : _____ Signature : _____

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How did you know about this programme?

Website HR Department E-News Others (Please specify) _____

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Terms and Conditions

- All fees paid are non-refundable and non-transferable.
- Participants who have settled payments will receive course confirmation by e-mail within 7 days prior to the programme date.
- All payments must be settled before programme commencement.
- Priority of enrolment will be given on a 'first-come-first-serve' basis. HKIB Member will have priority to register if there is limited seat remained for the programme.
- HKIB would issue the "Certificate of Attendance" to participants who have complied with the "HKIB Attendance Policy". The Certificate will be mailed to the corresponding address within 10 working days after completion of the programme.
- We reserve the right to reject an enrolment at any time.
- We reserve the right to cancel, modify and/or postpone the programme due to unforeseen circumstances.
- The information given and personal data collected will be used for the purpose of administration and communication by the Institute.
- For the Typhoon or Rainstorm arrangement, please refer to the confirmation e-mail or HKIB's website (www.hkib.org).



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