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Programme Details

Date :	March & April 2020	Venue :	Virtual classroom via ZOOM
Enquiry Email :	programme@hkib.org	Enrollment Deadline :	7-days prior to course commencement
Enquiry Hotline :	(852) 2153 7800 or (852) 2190 7060	Special Offer :	Enroll 2 or more programmes in one time, enjoy a 10% discount off
Enrolment :	By email application.form@hkib.org, or by fax at (852) 2682 0218, or In person to our Institute		

NOTE 1 : ECF CPD includes CPD for CFMP, ARWP, CRWP and ACSP designation holders, excludes AAMLP and CAMLP

Programme Objectives & Outlines

Programme	Objectives	Outlines
<h3>Wealth Management for High Net-Worth Individuals (HNWIs) (Ref. #: 80/74/28) Compliance / AML related</h3>		
Module 1 – 24 March 2020 (Tue) 7:00pm – 10:00pm Cantonese (supplemented with English materials) 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. 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 – 1 April 2020 (Wed) 7:00pm – 10:00pm Cantonese (supplemented with English materials) 3 Hours	<ul style="list-style-type: none"> Understand different kinds of common investment vehicles for High Net Worth Individual (HNWI) customers. Different types, characteristics, risk and return profiles of these investment vehicles are also covered. 	<ul style="list-style-type: none"> Introduction Foreign Exchange Market Forward Market Instruments Money Market Instruments Equity Securities Debt Securities Derivatives Securities Structured Products
Module 3 – 28 March 2020 (Sat) 2:00pm – 5:00pm Cantonese (supplemented with English materials) 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. Costs and benefits of universal life insurance and premium financing will also be analyzed. 	<ul style="list-style-type: none"> Universal Life insurance Premium Financing
Module 4 – 2020年3月21日 (星期六) 早上10時下午1時 廣東話 (輔以中文講義) 信託服務及財富傳承 (HD000000P200234) 3 Hours	<ul style="list-style-type: none"> 認識近年來需求增長中的信託服務及財富傳承的解決方法 說明不同種類的信託及其特徵 信託服務作資產保護和財富傳承的好處 	<ul style="list-style-type: none"> 簡介 現代高端客戶財富傳承至下一代 信託的概念與結構 信託服務的好處 信託的實際操作 資產保障與財富傳承
Module 5 – 2020年3月17日 (星期二) 晚上7時至10時 廣東話 (輔以中文講義) 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 (HD000000P200335) 3 Hours	<ul style="list-style-type: none"> 認識醫療保障的種類和本地醫療保險的發展趨勢 向客戶提供有關醫療保障的合適財務計劃建議 	<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) 個案分析及研討 銷售技巧之應做與不應做
Module 6 – 2020年3月31日 (星期二) 晚上7時至10時 廣東話 (輔以中文講義) (HD000000P200336) 3 Hours		<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



IA CPD Programme Series

[Virtual Classroom] March & April 2020



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Wealth Management for High Net-Worth Individuals (HNWIs) (Ref. #: 80/74/28) Registration Form

Programmes		Time	Course Fees (Regular Price/ Discount Price)
Wealth Management for High Net-Worth Individuals (HNWIs) (Ref. #: 80/74/28)	<input type="checkbox"/> Module1 – Recent Developments of Global Wealth Management Market (HD000000P200331)	3 Hours 24 March 2020 (Tue) 7:00pm – 10:00pm	Programme Price by Training Hour <input type="checkbox"/> Individual Member ____ Training Hour(s) x HKD300 = HKD ____ <input type="checkbox"/> Staff of Corporate Member ____ Training Hour(s) x HKD360 = HKD ____ <input type="checkbox"/> Non-member ____ Training Hour(s) x HKD400 = HKD ____ Enroll 2 or more Programmes ***Discount Price <input type="checkbox"/> Individual Member ____ Training Hour(s) x HKD270 = HKD ____ <input type="checkbox"/> Staff of Corporate Member ____ Training Hour(s) x HKD324 = HKD ____ <input type="checkbox"/> Non-member ____ Training Hour(s) x HKD360 = HKD ____
	<input type="checkbox"/> Module 2 - Investment Vehicles for High Net-Worth Individuals (HD000000P200332)	3 Hours 1 April 2020 (Wed) 7:00pm – 10:00pm	
	<input type="checkbox"/> Module 3 – Sophisticated Financial Services for High Net-Worth Individuals (HD000000P200333)	3 Hours 28 March 2020 (Sat) 2:00pm – 5:00pm	
	<input type="checkbox"/> Module 4 - 信託服務及財富傳承 (HD000000P200234)	3 Hours 2020年3月21日 (星期六) 早上10時下午1時	
	<input type="checkbox"/> Module 5 - 合規投資及保險產品銷售流程的實務處理 (HD000000P200335)	3 Hours 2020年3月17日 (星期二) 晚上7時至10時	
	<input type="checkbox"/> Module 6 - 醫療保險市場之最新發展 (HD000000P200336)	3 Hours 2020年3月31日 (星期二) 晚上7時至10時	

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

Membership No : _____ Organisation : _____

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 : HKD _____

Cardholder's Name : _____ Signature : _____

Card No. : _____ Expiry Date : _____ (mm/yy)

How did you know about this programme?

- Website HR Department E-News Others (Please specify)
 Friends / Colleagues Banking Today HKIB Counter

Terms and Conditions

- All fees paid are non-refundable and non-transferrable.
- 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 in registration for those programmes with limited seats.
- 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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