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### Programme Details

<b>Date</b>	: 21, 22, 28, 29 July	<b>Venue</b>	: Virtual classroom via ZOOM
<b>Enquiry Email</b>	: programme@hkib.org	<b>Enrollment Deadline</b>	: 14 July 2020 (Tue)
<b>Enquiry Hotline</b>	: (852) 2153 7800 or (852) 2190 7060	<b>Special Offer</b>	: <b>Enroll 2 or more programmes in one time, enjoy a 10% discount off</b>
<b>Enrolment</b>	: By email to <a href="mailto:application.form@hkib.org">application.form@hkib.org</a> or In person to our Institute		

**NOTE 1** : ECF CPD includes CPD for CFMP, ARWP, CRWP and ACsP designation holders, excludes AAMLPL and CAMLP

### Programme Objectives & Outlines

Programme	Objectives	Outlines
<b>Strive for Communication Excellence (Ref. # 80/74/26)</b>		
Module 4 – <b>Winning Solution through the Voice of Customer</b> (HD000000P200712)  29 July 2020 (Tue) 7:00pm – 9:00pm Cantonese (supplemented with English materials)  <b>IA CPD - 2 Hours</b>	<ul style="list-style-type: none"> <li>To identify importance information and key message from the customers</li> <li>To analyze different message and information</li> <li>To turn the important information into business opportunities</li> </ul>	<ul style="list-style-type: none"> <li>Introduction</li> <li>Overcoming Major Barriers</li> <li>Key Sustainable Innovation Factors</li> </ul>
Module 6 – <b>Identifying the Cross Selling &amp; Referral Opportunities</b> (HD000000P200710)  22 July 2020 (Wed) 7:00pm – 10:00pm Cantonese (supplemented with English materials)  <b>IA CPD - 3 Hours</b>	<ul style="list-style-type: none"> <li>To identify the customers’ needs during different demand cycle</li> <li>To define the linkage of customers’ needs and different products</li> </ul>	<ul style="list-style-type: none"> <li>Understanding of customer progressive needs</li> <li>Product fit to progressive needs</li> <li>Skills &amp; techniques on identifying cross selling &amp; referral opportunities</li> </ul>
<b>Wealth Management for High Net-Worth Individuals (HNWIs) (Ref. #: 80/74/28)</b>		
Module 1 - <b>Recent Developments of Global Wealth Management Market/</b> (HD000000P200711)  28 July 2020 (Tue) 7:00pm – 10:00pm Cantonese (supplemented with English materials)  <b>IA CPD - 3 Hours</b> <b>PWMA OPT - 3 Hours</b>	<ul style="list-style-type: none"> <li>Understand the recent trends and developments of the global wealth management market, especially for the High Net Worth Individual (HNWI) customers</li> <li>Understand the priorities for HNWIs in wealth management and increasing trends in international holdings and alternative investments will also be covered</li> </ul>	<ul style="list-style-type: none"> <li>High-net-worth individuals (HNWIs) vs. Ultra-high-net-worth individuals</li> <li>Top priorities for HNWIs in wealth management</li> <li>Recent trends in shifting away from wealth preservation</li> <li>Increases in international holdings and alternative investments by HNWIs</li> <li>HNWI’s wealth growth in recent years</li> </ul>
Module 6 – <b>醫療保險市場之最新發展</b> (HD000000P200709)  2020年7月21日 (星期二) 晚上7時至10時 廣東話 (輔以中文講義)  <b>IA CPD - 3 Hours</b> <b>PWMA OPT - 3 Hours</b>	<ul style="list-style-type: none"> <li>了解不同種類的醫保計劃，以及香港醫療保險的發展趨勢</li> <li>為顧客提供在醫療保險方面的合適財務策劃建議</li> </ul>	<ul style="list-style-type: none"> <li>醫療保險市場發展方向</li> <li>財務策劃在醫療保險的應用</li> <li>理賠個案分析</li> </ul>



# CPD Programme Series

[Virtual Classroom] July 2020



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## Strive for Communication Excellence (Ref. # 80/74/26) & Wealth Management for High Net-Worth Individuals (HNWIs) (Ref. #: 80/74/28)

### Registration Form

		Programmes	Time	Course Fees (Regular Price/ Discount Price)
<b>Strive for Communication Excellence</b> (Ref. # 80/74/26)	<input type="checkbox"/>	Module 4 – Winning Solution through the Voice of Customer (HD000000P200712)	2 Hours 29 July 2020 (Wed) 7:00pm – 9:00pm	<b>Programme Price by Training Hour</b> <input type="checkbox"/> Individual Member ___ Training Hour(s) x HKD250 = HKD _____ <input type="checkbox"/> Staff of Corporate Member ___ Training Hour(s) x HKD270 = HKD _____ <input type="checkbox"/> Non-member ___ Training Hour(s) x HKD370 = HKD _____
	<input type="checkbox"/>	Module 6 – Identifying the Cross Selling & Referral Opportunities (HD000000P200710)	3 Hours 22 July 2020 (Wed) 7:00pm – 10:00pm	
<b>Wealth Management for High Net-Worth Individuals (HNWIs)</b> (Ref. #: 80/74/28)	<input type="checkbox"/>	Module1 – Recent Developments of Global Wealth Management Market (HD000000P200711)	3 Hours 28 July 2020 (Tue) 7:00pm – 10:00pm	<b>Enroll 2 or more Programmes</b> <b>***Discount Price</b> <input type="checkbox"/> Individual Member ___ Training Hour(s) x HKD225 = HKD _____ <input type="checkbox"/> Staff of Corporate Member ___ Training Hour(s) x HKD243 = HKD _____ <input type="checkbox"/> Non-member ___ Training Hour(s) x HKD333 = HKD _____
	<input type="checkbox"/>	Module 6 – 醫療保險市場之最新發展 (HD000000P200709)	3 Hours 2020年7月21日 (星期二) 晚上7時至10時	

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**\*Turning on the video function and showing your face during the training is needed for attendance requirement in order to obtain attendance or CPD/CPT certificate.**

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

Membership No : \_\_\_\_\_ Organisation : \_\_\_\_\_

Department : \_\_\_\_\_ Position : \_\_\_\_\_

E-mail : \_\_\_\_\_ Mobile / Phone No : \_\_\_\_\_

Mailing Address : \_\_\_\_\_ HKID No : \_\_\_\_\_

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](mailto: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 at least 5 working 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 sent to your email within 15 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](http://www.hkib.org)).

Please visit HKIB website for more public programmes

