



Chartered Insurance Institute Professional Examination Preparatory Course Series - Award in Financial Planning (Hong Kong) 英國特許保險學院 財務規劃認證備試課程

The Chartered Insurance Institute (CII) is a professional body dedicated to building public trust in the insurance and personal finance profession. CII qualifications are universally recognised as evidence of knowledge and technical expertise. PolyU SPEED and CII are joining hands to offer the CII Professional Examination Preparatory Course Series to finance and insurance professionals

The CII Professional Examination Preparatory Course Series includes three single modules and a bundled module, preparing students for examinations for the following qualifications:

- **Award in Financial Planning (Hong Kong)**
- Award in Investment Planning
- Award in Customer Service in Insurance
- Certificate in Insurance and Financial Services

Why do you need CII qualifications?

- Advance your career
- Develop your core knowledge and capability
- Keep abreast of technical and market developments
- Achieve an internationally recognised designation "CII Award" and "Cert II"

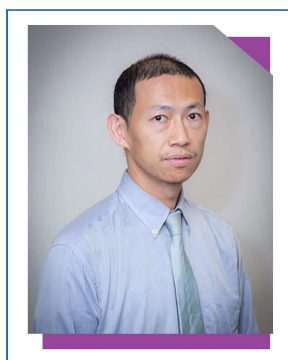


This particular examination preparation course aims to prepare financial practitioners for the examination for the CII Award in Financial Planning (Hong Kong). It also enables them to have a better grasp of financial knowledge, the financial planning process within a professional business environment, and the core investment, insurance and retirement products suitable for clients.

The course will cover the following topics:

- Seven typical life stages of an individual;
- Factfinding process;
- Determination of individual financial objectives;
- The regulatory framework in the Hong Kong market;
- Financial market overview;
- Regulatory authority and their roles and responsibilities;
- Licensing for financial advice; and
- Basic product knowledge in insurance, investment and retirement aspects





Lecturer Mr Michael Wong

BBus (S.Gld.); PgD [PolyU(H.K.)]; MSc (City H.K.);
FAIQ CII; RFP; CPA; CPA (Aust.); ACS; ACIS; ATIIHK

Senior Lecturer, College of Professional and Continuing Education,
The Hong Kong Polytechnic University



Course Details

Course Code:	SPDW025
Class Code:	HA32
Duration:	21 April - 7 May 2021 (Wed and Fri) (18 hours)
Time:	1900 - 2200
Fee:	Course fee: HK\$2,000 CII examination enrollment fee: HK\$1,040 (including the fee for digital study text, examination entry and first 12-month CII membership)
Venue:	PolyU West Kowloon Campus
Teaching Mode:	Face-to-face (The course may be changed to online mode if necessary.)
Medium of Instruction:	Cantonese (supplemented by English)
Entry Requirement:	Applicants should have Level 2 or above in five HKDSE subjects or equivalents.
Professional Recognition:	Students who have successfully completed the course will be eligible for a 12-month complimentary CII ordinary (unqualified) membership. If they pass the examination of CII, they will be recognised a CII (Award) and renowned a designation. Students will be able to use the completed Record of Achievement/certificate to meet the annual CPD requirement of the assessment period (which will be 15 hours of the assessment, except for the 3 CPD months of ethics and regulations).
Certification:	Certificate of Attendance (for students with at least 80% attendance)
Closing Date for Application:	3 April 2021 (Places are limited and will be allocated on a first come, first served basis.)
Submission of Application:	Scan the QR code for the application form and payment methods
Examinations & Membership of CII:	Students can attend online examinations arranged by CII. For further details regarding CII examinations, awards and memberships, please contact CII at 2520 0098 or hkenquiries@cii.co.uk .



CII



PolyU SPEED

Enquiries

Continuing Education Office, PolyU SPEED

Tel: 3400 2867 (Ms Chiu) / 3746 2916 (Ms Tsai)

E-mail: ceo@speed-polyu.edu.hk

Website: www.speed-polyu.edu.hk

SPEED reserves the right to cancel any course and to make variations to the schedules, venues, contents and mode of delivery of the courses offered.

School of Professional Education and Executive Development is operated by College of Professional and Continuing Education Limited which is an affiliate of The Hong Kong Polytechnic University.