



Chartered Insurance Institute

Professional Examination Preparatory

Course Series -

Award in Investment Planning

英國特許保險學院

投資規劃認證備試課程



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 Investment Planning**
- Award in Financial Planning (Hong Kong)
- 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 preparatory course aims to prepare financial practitioners for the examination for the CII Award in Investment Planning and enable them to have a better grasp of financial knowledge in:

- Main macro-economic factors that impact upon investment returns;
- Cash deposits, government securities and corporate bonds;
- Equity-based investment and property investment;
- Collective investment products and alternative investments; and
- The risks faced by investors and the importance of asset allocation.





Lecturer

Mr Michael Wong

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Course details

Course Code:	SPDW026
Class Code:	HA33
Duration:	12 - 26 May 2021 (Wed and Fri) (12 hours)
Time:	1900 - 2200
Fee:	Course fee: HK\$1,800 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 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 recognized 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

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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.