

Executive Certificate in Medical Insurance and Health Planning for Retirement

行政人員證書《醫療保險與退休健康管理》

The programme aims to equip wealth management practitioners with the latest knowledge and best practices in the fields of medical insurance and retirement planning. It provides a broad overview of all main categories of insurance contracts in the areas of medical and retirement planning. The programme focuses on the best practices of medical insurance and health planning for retirement in Hong Kong.

Module 1 : Principles of Medical Insurance (15 hours)

On completion of the module, students should be able to

- ✓ Explain the role and nature of medical insurance in financial planning
- ✓ Examine the principles of medical insurance and medical insurance compliance
- ✓ Analyze the document requirement and coverage in medical insurance
- ✓ Evaluate the best practices of medical insurance in financial planning

Module 2 : Behavioural Finance in Retirement Planning (15 hours)

On completion of the module, students should be able to

- ✓ Analyse the optimal asset allocation in retirement planning under traditional finance
- ✓ Discuss behavioural influences involving financial planning
- ✓ Examine behavioural finance models to strengthen awareness of biases in retirement planning
- ✓ Apply techniques of behavioural portfolio theory in retirement planning

Module 3 : Wellness and Healthy Ageing (15 hours)

On completion of the module, students should be able to

- ✓ Identify major issues of healthy ageing for older people in view of Hong Kong's local situation;
- ✓ Examine physical, cognitive and psychological factors in ageing;
- ✓ Analyse wellness promotion strategies and personal security;
- ✓ Apply the appropriate methods in managing wellness and healthy ageing.

Programme Structure

Executive Certificate in Medical Insurance and Health Planning for Retirement award will be conferred to candidates who have achieved at least 70% attendance as well as attained pass grades in both three modules of the programme.

Entry Requirement

Applicants shall hold:

- (a) a bachelor's degree awarded by a recognized University or equivalent; or
- (b) an Associate Degree/ a Higher Diploma or equivalent, and have at least 2 years of relevant work experience.

Applicants with other qualification and substantial senior level work experience will be considered on individual merit.

Course Fee

Programme Delivery

Language: English

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The Hong Kong Federation of Insurers (HKFI), a self-regulatory body of insurers, was established on 8 August 1988. It is a non-profit professional association comprising general insurance and life insurance companies in Hong Kong. The insurance industry is one of the few industries in Hong Kong that enjoys a high degree of self-regulation complemented by the Government's prudent regulatory framework. While maintaining a frequent dialogue with the Commissioner of Insurance on legislative issues affecting the industry, the HKFI actively promotes and perfects its self-regulatory regime with an aim of improving the professionalism of and strengthening public confidence in the insurance industry.

Venue: HK Island Campus



香港保險業聯會
The Hong Kong Federation of Insurers

Application Procedure

1. Apply via online application system
2. Submit the following to enrolment centres
 - Application form
 - HKID copy
 - Application fee HK\$150 (non-refundable)
 - Copy of academic/ professional qualification

Programme Enquiries

Telephone: 2867 8331
Fax: 2861 0278
Email: finedec@hkuspace.hku.hk
Website: <http://hkuspace.hku.hk/>
(Search words: EP138)



Application Deadline

7 days before each module start date

Enrolment Centres

Admiralty Learning Centre [ADC]

3/F, Admiralty Centre,
18 Harcourt Road, Hong Kong
(Exit A, Admiralty MTR Station)
3761 1111

Fortress Tower Learning Centre [FTC]

14/F, Fortress Tower, 250 King's
Road, North Point, Hong Kong
(Exit B, Fortress Hill MTR Station)
3762 0888

HPSHCC Campus [HPSHCC]

1/F, HPSHCC Campus,
66 Leighton Road,
Causeway Bay, Hong Kong
3923 7171

Island East Campus [IEC]

2/F, 494 King's Road,
North Point, Hong Kong
(Exit B3, North Point MTR Station)
3762 0000

HKU Campus [HKUC]

3/F, T.T. Tsui Bldg.
The University of Hong Kong
Pokfulam Road, Hong Kong
2975 5680

Kowloon East Campus [KEC]

1/F, 28 Wang Hoi Road,
Kowloon Bay, Kowloon
(Exit B, Kowloon Bay MTR Station)
3762 2222