#### **Financial Services and Insurance**

#### 金融服務和保險

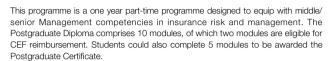
### Postgraduate Diploma in Management and Insurance

**2867 8474 / 2867 8314** padipmi@hkuspace.hku.hk









The programme adopts the Specification of Competency Standards (SCSs) for the insurance industry under HKQF in its curriculum design. It uses a work-based approach, equipping students with the appropriate level of skills to address the managerial and risk management aspects in the insurance industry under an increasingly stringent regulatory environment.

S HK\$3,600 per module Application Fee: HK\$200 12 months to 24 months

Q Level 6 (Reg. No.: 16/000724/L6) Validity Period: 01 Oct 2016 - on-going

### Advanced Diploma in Financial Planning

#### Application Code: 1965-FN005A









2867 8468

cfp@hkuspace.hku.hk

This programme prepares students for the CFP® Certification Examination (Foundation Level) and CFP® Certification Examination (Level 1 and 2) organized by the Institute of Financial Planners of Hong Kong. In addition, the programme also enables students to enter Year 3 of Edinburgh Napier University's Bachelor of Arts (with Honours) in Financial Services degree programme. Besides, degree holders can further their studies in finance postgraduate programmes (e.g., Postgraduate Diploma in Investment Management, Postgraduate Diploma in Investment Management and Financial Intelligence, Postgraduate Diploma in Applied Financial Engineering, Postgraduate Diploma in Finance and Data Analytics).

R Applicants should

- have gained in the HKCEE Grade E in 3 subjects and Level 2 in Chinese Language and English Language; OR
- have gained in the HKDSF Level 2 in 5 subjects:
- be aged 21 years of age or above and have 3 years of work experience.
- IFPHK candidacy is a pre-requisite for the Advanced Diploma in Financial Planning
- S Business modules HK\$3,600 HK\$5,550 AFP module: HK\$15,300 CFP level 1 & 2 modules; HK\$5.150 Application Fee: HK\$150
- 1 year to 2 years

English

Level 4 (Reg. No.: 14/003649/L4) Validity Period: 01 Jan 2015 - on-going





### 行政人員文憑《保險人力資源及財務管理》

2867 8475

executive@hkuspace.hk.hk

本課程旨在教授學員保險行業的專業知識,並培養及發展業界領袖所需的專業技 能。課程採用實例教學方法,向學員灌輸從事保險業應有的人事管理和財務知識。

\$ 每科 HK\$3600 報名費用⋅HK\$150 ▶ 4個月至5個月

#### Executive Certificate in Aircraft **Leasing and Financing**

#### Application Code: 1985-EP166A

2975 5767



ecalf@hkuspace.hku.hk

This programme offers the essential concepts and contemporary issue about aircraft leasing and financing. It provides a broad overview of main categories of different aircraft leasing transactions.

- Applicants shall hold:
  - a Bachelor's Degree awarded by a recognized University or equivalent; or
  - ii) an Associate Degree or a Higher Diploma or equivalent, and have at least 2 years of relevant work experience

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

HK\$6,000 Application Fee: HK\$150

1 month to 3 months

English

### 行政人員證書《家族辦公室管理與財富傳承》

報名代碼: 1980-EP155A

2975 5767



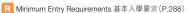
ecfomwi@hkuspace.hku.hk

本課程提供分析單一家族辦公室和聯合家族辦公室不同需要的知識,以及家族辦 公室管理業界的最新發展。本課程亦會利用真實案例及實戰練習,幫助同學了解如 何選擇或設立家族辦公室。

- 申請人應持有:
  - · 認可學院頒授的學士學位或同等學歷; 或
  - 副學士學位/高級文憑或同等學歷及最少兩年工作經驗
  - 申請人若持有其他資格或相關工作經驗,學院將按個別情況考慮。
- HK\$9 000 報名費用⋅HK\$150
  - 1個月至2個月

🛺 粵語輔以英語

See legend on page 1 & 9 圖像説明於第1及9頁



\$ Fee 學費

D Duration 修業期

For more and latest programme information, please visit our website 有關最新課程資訊及詳情,請瀏覽學院網站 hkuspace.hku.hk

### **Executive Certificate in Marine Insurance**

#### Application Code: 1970-EP142A

2867 8322

ecmi@hkuspace.hku.hk

The programme will primarily appeal to financial services executives who wish to equip themselves with latest knowledge in marine insurance for their professional advancement. The secondary target market includes business executives or new graduates who aim to take up opportunities in insurance sector with a focus of marine insurance

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

(c) hold relevant professional qualifications.

Applicants with other qualifications and substantial senior level work experience will be considered on individual merits.

S Application Fee: HK\$150

3 months



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## **Certificate for Module (Insurance Contract** and Compliance)

#### Application Code: 1975-AC107A

2867 8474 / 2867 8314



The programme aims to equip students with professional knowledge and skills to manage insurance contracts and assess possible risks and threats under an increasingly stringent regulatory environment in the insurance industry.

- Applicants should
  - hold a bachelor's degree awarded by a recognized institution or
  - a recognized professional qualification plus five years of full-time work experience at senior managerial level in related industries

#### AND

provide evidence of English proficiency (if the degree or equivalent qualification is from an institution where the language of teaching and assessment is not English) such as:

- an overall band of 6.0 or above with no subtests lower than 5.5 in the IELTS; or
- a score of 550 or above in the paper-based TOEFL, or a score of 213 or above in the computer-based TOEFL, or a score of 80 or above in the internet-based TOEFL; or
- HKALE Use of English at Grade E or above: or
- HKDSE Examination English Language at Level 3 or above; or
- equivalent qualifications

Applicants with other qualifications and relevant work experience will be considered on individual merit.

- HK\$8000 (per programme) Application Fee: HK\$150

- English
- Level 6 (Reg. No.: 21/001079/L6) Validity Period: 01 Oct 2021 on-going

#### Chartered Insurance Institute (CII) **Professional Examination Preparatory Programme**

2867 8475

cii@hkuspace.hku.hk

For details, please refer to P.34

Programme Tittle	HKU SPACE Programme Code
Chartered Insurance Institute (CII) Professional Examination Preparatory Programme - Award in General Insurance (Hong Kong)	FINA9343
Chartered Insurance Institute (CII) Professional Examination Preparatory Programme - Insurance Claims Handling (non-UK)	FINA9345
Chartered Insurance Institute (CII) Professional Examination Preparatory Programme - Insurance Underwriting (non-UK)	FINA9344
Chartered Insurance Institute (CII) Professional Examination Preparatory Programme - Introduction to Risk Management	FINA9346

### **Designing a Detailed Retirement Plan**

#### 報名代碼: 1980-1641NW

2520 4612

finsc@hkuspace.hku.hk

This workshop focuses on helping individual design a solid financial plan to fund his/ her retirement. You will be working on your own retirement planning, remember to bring your own calculator to the workshop.

本工作坊集中於教授如何為個人設計一份針對退休生活的財務策劃。你將會為自 己度身訂製一個專屬於你自己的退休計劃,請務必攜帶計數機

\$ HK\$2,000

2867 8487 / 2867 8314

dipip@hkuspace.hku.hk





本課程旨在教授學員保險行業的實務知識,並發展業界所需的技能。課程採用實 例教學方法,向學員教授保險原理、產品和銷售的相關知識,內容亦能幫助業界 人士備考IIQE的考試。本課程最快可於半年內完成。

- 每科學費 HK\$3,000,四科合共 HK\$12,000 報名費用: HK\$150 (取錄與否, 恕不退還)
- 資歷架構級別:3資歷名冊登記號碼:20/000076/L3 資歷名冊登記有效期:2020年3月1日-持續有效

報名代碼: 1970-1498NW





2520 4612

finsc@hkuspace.hku.hk

本課程包括三個不同主題的工作坊,每一個工作坊為6小時,三個工作坊提供總 學習時數為18小時。旨在向學員介紹有關財務策劃的安排及其中所涉及的法律和 條例。在課程中,講者將分享有關財務策劃中常見的法律知識及實務案例,以幫 學員實現更好的財務計劃。

\$ HK\$1,600

D 2個星期

粵語; 教材以英語為主

# 財務策劃工作坊系列 -



報名代碼: 1965-1876NWNW

2520 4612

finsc@hkuspace.hku.hk

本課程包括三個不同主題的工作坊,每一個工作坊為6小時,三個工作坊提供總學 習時數為18小時。旨在向學員介紹有關財務策劃的安排及其中所涉及的法律和條 例。在課程中,講者將分享有關財務策劃中常見的法律知識及實務案例,以幫學 員實現更好的財務計劃。

\$ HK\$1,600

D 2個星期

🛂 粵語; 教材以英語為主

#### 財務策劃工作坊系列 -財務策劃及遺產管理



報名代碼: 1965-1880NW





finsc@hkuspace.hku.hk

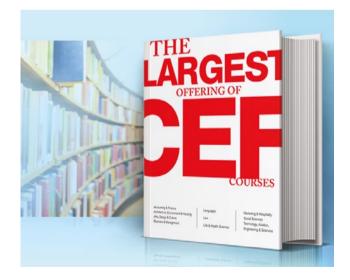
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S HK\$1,600

2520 4612

▶ 2個星期

粵語: 教材以英語為主



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See legend on page 1 & 9 圖像説明於第1及9頁

R Minimum Entry Requirements 基本入學要求(P.288)

\$ Fee 學費

D Duration 修業期

For more and latest programme information, please visit our website 有關最新課程資訊及詳情,請瀏覽學院網站 hkuspace.hku.hk

049

Accounting & Finance 會計及金融

🎨 Medium of Instruction 教學語言 Q Qualifications Framework 資歷架構 📙 Exemption 豁免 🕒 Short Course 短期課程