

Financial Services and Insurance

金融服務和保險

Postgraduate Certificate in Management and Insurance

Programme Code: AC123A

Application Code: 2345-AC123A

☎ 2867 8474

✉ pgdipmi@hkuspace.hku.hk

The Postgraduate Certificate in Management and Insurance programme is designed to provide students with a broad understanding of risk and insurance. Upon completion of the programme, students are equipped with knowledge in the insurance industry and to develop professional competencies needed to be a leader in the field. The curriculum is designed based on the Specification of Competency Standards (SCSs) of the Insurance Industry in Hong Kong. The programme adopts a practical 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.

- R** Applicants shall:
- la) hold a bachelor's degree awarded by a recognized institution or
 - lb) a recognized professional qualification plus five years of full-time work experience at senior managerial level in related industries
- AND
- ll) 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:
 - i. an overall band of 6.0 or above with no subtests lower than 5.5 in the IELTS; or
 - ii. 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
 - iii. HKALE Use of English at Grade E or above; or
 - iv. HKDSE Examination English Language at Level 3 or above; or
 - v. equivalent qualifications.

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

\$ HK\$5,000

Application Fee: HK\$150

D 9 months to 12 months

🇬🇧 English

Q Level 6 (Reg. No.: 23/000261/L6) Validity Period: 01 Apr 2023 - on-going

Advanced Diploma in Financial Planning

Programme Code: FN005A

Application Code: 2340-FN005A

☎ 2867 8468

✉ cfp@hkuspace.hku.hk

This programme prepares students for the CFP® Certification Examination (Foundation Level) and CFP® Certification Examination (Advanced Level Paper 1 and Advanced Level Paper 2) organized by the Institute of Financial Planners of Hong Kong. The graduates of Advanced Diploma can further articulate to Degree programmes. 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 Finance and Data Analytics, Postgraduate Diploma in FinTech and Legal Regulations, and Postgraduate Diploma in Financial Analytics and Algo Trading).

- 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 HKDSE 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 Programme

**Please upload copy of HKID and complete Employment Information while applying online.

\$ Business modules HK\$4,200 - HK\$6,200

AFP module: HK\$16,800

CFP level 1 & 2 modules: HK\$5,750 each module

Application Fee: HK\$150

D 1 year to 2 years

🇬🇧 English

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

Executive Certificate in Marine Insurance

Programme Code: EP142A

Application Code: 2270-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.

\$ HK\$9,000

Application Fee: HK\$150

D 3 months

🇬🇧 English

保險實務文憑

課程編號: AC101A

報名代碼: 1975-AC101A

☎ 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

D 216 小時

Q 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

Certificate for Module (Certified Insurance Professionals Induction Course)

Programme Code: AC153A

Application Code: 2265-AC153A

☎ 2867 8487

✉ shortcourse@hkuspace.hku.hk

The programme aims to equip insurance practitioners with knowledge of insurance, financial planning and related investment products. It will also cover business ethics and regulations for insurance, financial and investment planning in Hong Kong market.

\$ HK\$8,000

D 3 months

Q Level 4 (Reg. No.: 24/000274/L4) Validity Period: 01 Mar 2024 - on-going

Certificate for Module (Insurance Contract and Compliance)

Programme Code: AC107A

Application Code: 2175-AC107A

☎ 2867 8474

✉ pgdipmi@hkuspace.hku.hk

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.

\$ HK\$8,000 per programme

Application Fee: HK\$150

D 33 hours

🇬🇧 English

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

See legend on page 031 圖像說明於第 031 頁

R Minimum Entry Requirements 基本入學要求 (P.017)

\$ Fee 學費

D Duration 修業期

🇬🇧 Medium of Instruction 教學語言

Q Qualifications Framework 資歷架構

E Exemption 豁免

S Short Course 短期課程

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

AFP Certification Refresher Course

Programme Code: FINA9293

S

Application Code: 2355-1175NW



☎ 2867 8468

✉ cfp@hkuspace.hku.hk

This 10-hours' short course will help the students go through different type of questions step-by-step and the relevant tricks required to tackle these questions. Students are assumed to have the knowledge required for the AFP syllabus.

💰 HK\$3,500

🕒 10 hours

🗣 Cantonese

退休規劃工作坊

課程編號: FINA9263

S

報名代碼: 2350-2202NW



☎ 2520 4612

✉ finsc@hkuspace.hku.hk

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，請務必攜帶計算機。

💰 HK\$2,700

🕒 1 日

🗣 英語，輔以粵語

個人財務策劃工作坊系列 –
整合財務安排及保險策劃

課程編號: FINA9335

S

報名代碼: 2290-1671NW



☎ 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3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\$2,300

🕒 2 個星期

🗣 粵語

個人財務策劃工作坊系列 –
財務策劃及信托安排

課程編號: FINA9334

S

報名代碼: 2340-1220NW



☎ 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\$2,300

🕒 1 日

🗣 粵語

個人財務策劃工作坊系列 –
財務策劃及遺產管理

課程編號: FINA9333

S

報名代碼: 2290-1609NW



☎ 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\$2,300

🕒 1 日

🗣 粵語

NCR¹

This is an exempted course under the Non-Local Higher and Professional Education (Regulation) Ordinance. 根據《非本地高等及專業教育(規管)條例》，本課程屬獲豁免課程。

NCR²

These are exempted courses under the Non-Local Higher and Professional Education (Regulation) Ordinance. 根據《非本地高等及專業教育(規管)條例》，這些課程屬獲豁免課程。

NCR³

The course operator is applying for exemption under the Non-local Higher and Professional Education (Regulation) Ordinance. 課程主辦人正根據《非本地高等及專業教育(規管)條例》辦理豁免註冊手續。It is a matter of discretion for individual employers to recognize any qualification to which this course may lead. 個別僱主可酌情決定是否承認本課程可令學員獲取的任何資格。