



# 香港專業保險經紀協會

## PROFESSIONAL INSURANCE BROKERS ASSOCIATION

Ref. No. : MEMO/154/2020  
To : All Members  
From : Herman Cheung - Education Sub-Committee Chairman  
Date : 15 October 2020

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### Pilot Programme to Enhance Talent Training for the Insurance Sector

CPD Course co-organized with  
The Chartered Insurance Institute Hong Kong Limited



### Techniques and Practices for Broking in a Hardening Market to Obtain the Best Results for Clients (Part I) (Webinar)

- Contents : • Recognizing the appetite and underwriting restrictions on terms and capacity of the insurer  
• Best professional practices in approaching an underwriter  
• Need for detailed professionally presented underwriting information  
• Adequate information but not data dumping  
• Patient approach, not broker demands
- Facilitator : **Ms Janet Sherry (in United Kingdom)**  
- Performed a variety of client relationship roles in the insurance and risk management world over more than 30 years  
- Possesses over 9 years of training experience
- Date : 10 November 2020 (Tuesday)
- Time : 3:30pm – 6:30pm  
(You should enter the room 15~30 minutes earlier for attendance taking)
- Venue : **Microsoft Teams (Link will be provided after confirmation)**
- **You must use a device with a camera.** You can enter the class room in the following 3 means:
1. Browser on Laptop/PC
  2. Microsoft Teams Application on Laptop/PC
  3. Microsoft Teams Application on Phone/Tablet
- Medium of Teaching : **English**
- Credits : **3 IA CPD Hours & 3 MPFA CPD non-core Credits**
- Online Enrollment : **\*\* [Click here](#) \*\***  
**\*\*Priorities will be given to those who enroll to both parts\*\***



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- Enrollment Deadline : **For PIBA & CII Members:**  
6:00pm of 3 November 2020 or when it is full, whichever is earlier  
**For non-PIBA Members:**  
From 22 October 2020 to 6:00pm of 3 November 2020 or when it is full, whichever is earlier.
- Administration Fee : **\*\*Payment advice will be emailed to enrollee if your seat is confirmed\*\***  
HK\$90 (for PIBA and CII members)  
HK\$180 (for non-PIBA members)
- Important Notes :
  1. Seats are allocated on a first-come-first-served basis.
  2. Administration fee is non-refundable and non-transferable.
  3. 0.5 CPD Hour will be deducted for absence more than 15 minutes, no CPD Certificate for absence more than 30 minutes
  4. **Digital CPD Certificate will be issue through email**
  5. **Identity Verification will be required.**

For enquiry, please feel free to contact our Ms Iris Hau at 2116 0372.