



香港專業保險經紀協會

PROFESSIONAL INSURANCE BROKERS ASSOCIATION

Ref. No. : MEMO/155/2020
To : All Members
From : Herman Cheung - Education Sub-Committee Chairman
Date : 15 October 2020

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 II) (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 : 11 November 2020 (Wednesday)
- 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.