

CPD Training Course 18 Hours

Live broadcast: Zoom Class

25-29
APRIL
2022

9-Hour Series 1 - Market Updates for Financial Service Industry

- 1 《打擊洗錢條例》
 - 什麼是洗錢？
 - 有關洗錢的立法
 - 識別和報告可疑交易
 - 《反洗錢及反恐融資（金融機構）條例》
 - 香港法例第615章 簡介
- 2 董事及高級管理人員責任保險(D&O)
 - 什麼是董事及高級管理人員責任保險(D&O)
 - 為什麼D&O如此重要
 - 案例分析
- 3 Agency 招聘增員
從招聘開始建立團隊的基礎8件事
 - 招募作業流程化
 - 招聘第一原理
 - 招聘後為什麼留不住？
 - 建立團隊的基礎
 - 專注的招聘 用心的帶團隊
 - 建立團隊的基礎8件事
 - 團隊的定義定位
 - 找人才 - 人才的基本輪廓
 - 招募流程標準
 - 招募工具箱
 - TOD & COP 流程
 - 迎接禮儀
 - 要求推薦
 - 團隊的存活與成長
- 4 從計算一輩子的開銷來分析顧客的保障
 - 銷售: 從算出一生花費- 知道買夠了嗎?買對了嗎?
 - 了解市場·調整自己的態度&策略
 - 市場出現拐點的要求: 不變就難以前行
 - 必須整理的8+1個原則: 生存到增長
 - 還有更高的要求 - 3W
 - 有了8+1的基礎, 還需要怎樣的配合

9-Hour Series 2 - Latest Market Updates in Diversified Investment

- 5 了解中國高淨值人群HNW的經濟觀與資產管理需求
 - 全面了解內地高淨值家族群體
 - 高淨值人士的需求
 - 高淨值人群生活品質與消費觀
 - 高淨值人士的醫療及健康服務需求
 - 中國高淨值人群的投資展望: 另類投資
- 6 藝術品市場投資機遇 - NFT如何撼動藝術界
 - 藝術品金融投資理財新趨勢
 - 環球、中國及藝術市場
 - 金融科技與藝術品交易
 - 藝術銀行: 金融與藝術的跨界
- 7 藝術品市場投資機遇 - 藝術品投資基金與古董投資
 - 藝術品投資基金與藝術品的價值
 - 藝術世界生態系統與未來
 - 古董收藏的難點
 - 深度觀察 - 案例研究
- 8 醫療健康和生物科技重塑醫療格局 - 高端醫療保險與高淨值群體的關鍵需求
 - 醫療行業新趨勢
 - 高齡照護產業的黃金契機
 - AI科技+生技醫療
 - 再生醫學時代 - 幹細胞治療現況
 - 再生醫學時代 - 人工組織市場
 - 醫療旅遊

Aim and Objective

Aim to help professionals enhance and reinforce the knowledge of rules and regulations, additionally equip practitioners of the insurance industry with more tools in team building, recruiting, and selling. The last component, aside from laws and operations, is bringing significant knowledge of related areas that are usually being omitted - namely the understanding the high net worth group and their needs; the most advanced medical and biotechnology available for the rich; and an important alternative investment- art investment that most of the HNW have set foot on it.

PROFESSIONAL INSTRUCTORS

Mr. Lowell Lo (CPA, AICPA, ISACA, SIFM)

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Venhouse Financial Planning

Mr. Gawain Ma (CFP)

Director
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Course Name	Language	Date & Time	Charge (HKD)	Hours
<input type="checkbox"/> 1. 《打擊洗錢條例》	Cantonese	25/4/2022 (Mon) 15:00-17:00	300/240*	2
<input type="checkbox"/> 2. 董事及高級管理人員責任保險 (D&O)	Cantonese	26/4/2022 (Tue) 10:00-11:00	150/120*	1
<input type="checkbox"/> 3. Agency 招聘增員 從招開始建立團隊的基礎8件事	Cantonese	26/4/2022 (Tue) 14:00-17:00	450/360*	3
<input type="checkbox"/> 4. 從計算一輩子的開銷來分析顧客的 保障	Cantonese	27/4/2022 (Wed) 10:00-13:00	450/360*	3
<input type="checkbox"/> 5. 了解中國高淨值人群HNW的經濟觀 與資產管理需求	Cantonese	27/4/2022 (Wed) 14:00-17:00	450/360*	3
<input type="checkbox"/> 6. 藝術品市場投資機遇 - NFT如何撼動藝術界	Cantonese	28/4/2022 (Thu) 10:00-12:00	300/240*	2
<input type="checkbox"/> 7. 藝術品市場投資機遇 - 藝術品投資基金與古董投資	Cantonese	28/4/2022 (Thu) 14:00-15:00	150/120*	1
<input type="checkbox"/> 8. 醫療健康和生物科技重塑醫療格局 - 高端醫療保險與高淨值群體的關鍵需求	Cantonese	29/4/2022 (Fri) 14:00-17:00	450/360*	3

Please tick your desired course(s).
20% off for supporting units members
Attendance certificate will be issued after the course(s).

*The CPD Training Hours of
the above courses are
applicable to member of IA.

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Enquiry and Registration Hotline

Tel : (852) 2593 9653

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Payment Method

i) Cheque (Payable to "BMI Professional Training Centre Limited")

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ii) Bank Transfer * (A/C No.: 787 – 102524 - 883) Hang Seng Bank Limited

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