

# CPD Training Course 19 Hrs

## Market Updates for Insurance and Ethics or Regulations

### Effective NLP Selling Skills Builder

20 - 23 July 2021

#### Modules

#### Outline

##### Live broadcast: Zoom Class

「道德或規例」範疇  
 20/07/2021 (Tue)  
 10:00-13:00

- 《持牌保險代理人操守守則》的背景及介紹
- 分析《持牌保險代理人操守守則》的主要條例
- 闡釋《持牌保險代理人操守守則》的一般原則
- 了解持牌保險代理機構的管控及程序
- 掌握優質銷售保險業務的行為規範

保險業內的風險管理  
 20/07/2021 (Tue)  
 15:00-17:00

- 了解風險管理的概念；
- 確定業務中的風險管理策略
- 適合公司的風險管理策略
- 描述各種商業保險的保障

《打擊洗錢條例》  
 21/07/2021 (Wed)  
 10:00-12:00

- 什麼是洗錢？
- 有關洗錢的立法
- 識別和報告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

保險產業趨勢展望  
 21/07/2021 (Wed)  
 14:00-16:00

- 保險業者的現狀
- 趨勢（科技·產品開發·併購·監管·數位科技風險·隱私）
- 稅改

##### Face-to-Face Class

潛能激發  
 22/07/2021 (Thu)  
 10:00-12:00

- 建立創新思維
- 認識潛能意識的力量
- 多角度思維方式
- 感受心態的力量
- 換框法
- 保險行業應用

NLP銷售技巧  
 22/07/2021 (Thu)  
 14:00-17:00

- 認識自我·了解銷售
- 打破銷售障礙
- 理財銷售12前題假設
- 讀懂顧客心理
- 迅速提升親和力
- 保險銷售應用

壓力管理  
 23/07/2021 (Fri)  
 10:00-12:00

- 保險從業員的工作壓力
- 什麼是壓力
- 如何面對壓力
- 處理壓力的技巧
- 建立卓越圈
- 保險行業應用

深層客戶溝通技巧  
 23/07/2021 (Fri)  
 14:00-17:00

- NLP深層溝通技巧
- FABE銷售法
- GSBC模型
- 異議處理技巧
- 如何撰寫銷售講稿
- 保險銷售應用

## Aim and Objective

Aim to help professionals and executives obtain the latest knowledge on financial, management information to improve their capabilities, increase risk awareness of the changing trends of direction in their professional. We are committed to provide high quality and most updated information to enhance their knowledge and competitiveness. Meanwhile, in response to the regulations of IA, a course on the Ethics or Regulations was launched to ensure that they have the professional ability and level to provide services to policyholders and potential policyholders.

## Professional Instructors

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

Chairman and Executive Director  
BM Intelligence Group

### Mr. Vincent Li (ACA, FCCA, FCPA(Practising))

Partner  
ShineWing CPA Limited (Beijing)

### Mr. Huang Tak Wan Oswald

Solicitor, Hong Kong (Non-practising), CA (Singapore),  
FCCA, JD, PCLL

### Mr. Fung Man Kei, Pete (CFP, FLMI, ARA, UND, ACS, ANZIIF Fellow)

Director  
Agile Elite Consultancy Limited

### Mr. Stephen Chan (CPA, AAS)

Director  
Trinity-C Management Limited

### Mr. Gawain Ma (CFP)

Director  
A-one Alliance Limited

### Mr. Simon Leung

Professional AML/CFT  
trainer and consultant

### Mr. Andy Li (APA, CMA IPA)

CFO and Company Secretary  
Hope Life International  
Holdings Limited

### Mr. Armond Chan

Practicing Barrister  
Former Chief Superintendent of Hong  
Kong Police Force

Register Now!




Course Name	Language	Date & Time	Charge(HKD)
Market Updates for Insurance and Ethics or Regulations : Live broadcast: Zoom Class (9 hours) Certificate empowered by BMI Professional Training Center			
<input type="checkbox"/> 「道德或規例」範疇	Cantonese	20/07/2021 (Tue) 10:00-13:00	450/360#
<input type="checkbox"/> 保險業內的風險管理	Cantonese	20/07/2021 (Tue) 15:00-17:00	300/240#
<input type="checkbox"/> 《打擊洗錢條例》	Cantonese	21/07/2021 (Wed) 10:00-12:00	300/240#
<input type="checkbox"/> 保險產業趨勢展望	Cantonese	21/07/2021 (Wed) 14:00-16:00	300/240#
Effective NLP Selling Skills Builder : Face-to-Face Class (10 hours) Certificate empowered by Agile Elite Consultancy Limited			
<input type="checkbox"/> 潛能激發	Cantonese	22/07/2021 (Thu) 10:00-12:00	300/240#
<input type="checkbox"/> NLP銷售技巧	Cantonese	22/07/2021 (Thu) 14:00-17:00	450/360#
<input type="checkbox"/> 壓力管理	Cantonese	23/07/2021 (Fri) 10:00-12:00	300/240#
<input type="checkbox"/> 深層客戶溝通技巧	Cantonese	23/07/2021 (Fri) 14:00-17:00	450/360#

Location : Suite 01-08, 27/F., Shui On Centre, 6-8 Harbour Road, Wanchai, Hong Kong

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.

For more information, please visit [www.bmiptc.com](http://www.bmiptc.com)

or  
Follow us on facebook  [bmiptc](https://www.facebook.com/bmiptc)

### Personal Details (in BLOCK letters)

English Name: \_\_\_\_\_ Chinese Name: \_\_\_\_\_

Name of Company: \_\_\_\_\_

Name of Department: \_\_\_\_\_ Position Held: \_\_\_\_\_

Correspondence Address: \_\_\_\_\_

Email: \_\_\_\_\_ Facebook Name: \_\_\_\_\_

Office Tel. No.: \_\_\_\_\_ Mobile: \_\_\_\_\_ Fax: \_\_\_\_\_

### Enquiry and Registration Hotline

Tel : (852) 2593 9653

Fax : (852) 2866 0454

### Payment Method

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

Cheque No.: \_\_\_\_\_

HK Dollar: \_\_\_\_\_

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

Please send a copy of the bank pay in slip (with your name on it) together  
with the application form to us by fax or by e-mail.

Email : [registration@bmiptc.com](mailto:registration@bmiptc.com)

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