

## Insurance Intermediaries Quality Assurance Scheme List of Currently Approved CPD Activities

*(The approval status of the following CPD activities is currently in effect)*

\*: Modular design is adopted. In other words, participants can choose to attend part of the activity. If the participant has not attended the CPD activity in full, he/she should only be awarded the number of CPD hours of the module(s) that he/she has attended.

\*\* : All: General Insurance, Life Insurance and Investment Linked Insurance licences individual insurance intermediary

GE: General licence individual insurance intermediary

LI: Life licence individual insurance intermediary

IL: Investment-Linked licence individual insurance intermediary

**New: Newly approved activities**

**Renewed: Approval - Renewed activities**

Ref.	Name of Organizer	Title of CPD Activity	No. of CPD hours	Current Approval Period	Target Participants	Contact
INS-CPD-2017-11 (Renewed)	AIA International Limited	Investment-Linked Long Term Ins. Training	10	1 Oct 2018 - 30 Sep 2019	In-house	Mr. David Lo (+853) 8988 1821
INS-CPD-2017-12 (Renewed)	AIA International Limited	Claims Management Training	10	1 Oct 2018 - 30 Sep 2019	In-house	Mr. David Lo (+853) 8988 1821
INS-CPD-2017-16 (Renewed)	Manulife (International) Limited	Comprehensive Financial Planning	6	1 Nov 2018 - 31 Oct 2019	In-House (Contracted Insurance Agent)	Mr. Ivan Wong (+853) 8291 9445
INS-CPD-2017-17	MassMutual Asia Limited	Fundamental Agency Management Training	6.5	1 Dec 2017 - 30 Nov 2018	In-house + Commissioning Body + Brokers	Mr. Edmond Tse (+852) 2919 9568
INS-CPD-2017-18	MassMutual Asia Limited	New Consultants Orientation Program*	28.5	1 Dec 2017 - 30 Nov 2018	In-house + Commissioning Body + Brokers	Mr. Edmond Tse (+852) 2919 9568
INS-CPD-2017-19	FWD Life Insurance Company (Macau) Ltd.	Financial Planning Series*	24	1 Jan 2018 - 31 Dec 2018	In-house + Commissioning Body + Bank Partners	Mr. Bruce Fong (+853) 8988 6129
INS-CPD-2017-20	MassMutual Asia Limited	Advanced Wealth Management Training*	12	1 Jan 2018 - 31 Dec 2018	In-house + Commissioning Body + Brokers	Mr. Edmond Tse (+852) 2919 9568

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INS-CPD-2017-21	MassMutual Asia Limited	Selling Skills Enhancement Series*	15	1 Jan 2018 - 31 Dec 2018	In-house + Commissioning Body + Brokers	Mr. Edmond Tse (+852) 2919 9568
INS-CPD-2018-01	IFS & Open Institute of City University of Macau	Accounting	10	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Celeste Vong (+853) 8590 2642 Ms. Kun Wai Leng (+853) 8297 2621
INS-CPD-2018-02	IFS & Open Institute of City University of Macau	Company and Contract Law	10	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Celeste Vong (+853) 8590 2642 Ms. Kun Wai Leng (+853) 8297 2621
INS-CPD-2018-03	IFS & Open Institute of City University of Macau	Economics	10	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Celeste Vong (+853) 8590 2642 Ms. Kun Wai Leng (+853) 8297 2621
INS-CPD-2018-04	IFS & Open Institute of City University of Macau	Human Resources Management	10	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Celeste Vong (+853) 8590 2642 Ms. Kun Wai Leng (+853) 8297 2621
INS-CPD-2018-05	IFS & Open Institute of City University of Macau	Information Systems	10	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Celeste Vong (+853) 8590 2642 Ms. Kun Wai Leng (+853) 8297 2621
INS-CPD-2018-06	IFS & Open Institute of City University of Macau	Marketing	10	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Celeste Vong (+853) 8590 2642 Ms. Kun Wai Leng (+853) 8297 2621
INS-CPD-2018-07	IFS & Open Institute of City University of Macau	Strategic Management	10	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Celeste Vong (+853) 8590 2642 Ms. Kun Wai Leng (+853) 8297 2621
INS-CPD-2018-08	IFS & Open Institute of City University of Macau	Statistics	10	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Celeste Vong (+853) 8590 2642 Ms. Kun Wai Leng (+853) 8297 2621
INS-CPD-2018-09	IFS & Open Institute of City University of Macau	Quantitative Methods	10	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Celeste Vong (+853) 8590 2642 Ms. Kun Wai Leng (+853) 8297 2621

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INS-CPD-2018-10	IFS & Open Institute of City University of Macau	Organisational Behaviour	10	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Celeste Vong (+853) 8590 2642 Ms. Kun Wai Leng (+853) 8297 2621
INS-CPD-2018-11	IFS & Open Institute of City University of Macau	Claims Management	10	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (GE+LI)** + Commissioning Body + Public	Ms. Celeste Vong (+853) 8590 2642 Ms. Kun Wai Leng (+853) 8297 2621
INS-CPD-2018-12	IFS & Open Institute of City University of Macau	Financial Planning	10	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (LI+IL)** + Commissioning Body + Public	Ms. Celeste Vong (+853) 8590 2642 Ms. Kun Wai Leng (+853) 8297 2621
INS-CPD-2018-13	IFS & Open Institute of City University of Macau	Life Insurance-Basic Actuarial Planning and Control	10	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (LI)** + Commissioning Body + Public	Ms. Celeste Vong (+853) 8590 2642 Ms. Kun Wai Leng (+853) 8297 2621
INS-CPD-2018-14	IFS & Open Institute of City University of Macau	Risk Management	10	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Celeste Vong (+853) 8590 2642 Ms. Kun Wai Leng (+853) 8297 2621
INS-CPD-2018-15	IFS & Open Institute of City University of Macau	Credit Insurance	10	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (GE)** + Commissioning Body + Public	Ms. Celeste Vong (+853) 8590 2642 Ms. Kun Wai Leng (+853) 8297 2621
INS-CPD-2018-16	Macau Institute of Financial Services	Law of Inheritance in Macao	6	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-17	Macau Institute of Financial Services	Credit Risk Management for Corporate Banking: Red Flag Credit Warning Signal for Corporate Borrower	12	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-18	Macau Institute of Financial Services	Notary and Power of Attorney	6	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626

Ref.	Name of Organizer	Title of CPD Activity	No. of CPD hours	Current Approval Period	Target Participants	Contact
INS-CPD-2018-19	IFS & Macau Financial Development Centre	The Principles and Applications of Fund Investment	12	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-20	IFS & Macau Financial Development Centre	The Principles and Applications of Derivative Warrants & CBBCs	12	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-21	Macau Institute of Financial Services	Fundamentals of Personal Financial Planning	15	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-22	Macau Institute of Financial Services	Insurance (Module I) - Principles and Practice of Insurance	16	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-23	Macau Institute of Financial Services	Insurance (Module II) - Non Life Insurance	16	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (GE)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-24	Macau Institute of Financial Services	Insurance (Module III) - Life Insurance	19	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (LI)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-25	Macau Institute of Financial Services	Insurance (Module V) - Investment-Linked Long Term Insurance	19	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (LI+IL)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-26	Macau Institute of Financial Services	The Principles of Risk Management	5	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-27	Macau Institute of Financial Services	Risk Management for Financial Institutions	5	1 Jan 2018 - 31 Dec 2018	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-28	Jardine Lloyd Thompson Limited	Business Knowledge Series*	8	01 Feb 2018 - 31 Jan 2019	In-house	Ms. Anne Chan (+852) 2864 5318

Ref.	Name of Organizer	Title of CPD Activity	No. of CPD hours	Current Approval Period	Target Participants	Contact
INS-CPD-2018-29	Jardine Lloyd Thompson Limited	E & O Awareness Training*	6	01 Feb 2018 - 31 Jan 2019	In-house	Ms. Anne Chan (+852) 2864 5318
INS-CPD-2018-30	AIA International Limited	Financial Planning Workshop	5	01 Mar 2018 - 28 Feb 2019	In-house	Mr. David Lo (+853) 8988 1821
INS-CPD-2018-31	IFS & PEAK/VTC (H.K)	Persuasion Skills for Financial Services Practitioners	5	01 Mar 2018 - 28 Feb 2019	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-32	IFS & PEAK/VTC (H.K)	Construction All Risks (CAR) and Related Professional Liability Insurance Underwriting and Claims Handling	4	01 Mar 2018 - 28 Feb 2019	Insurance Intermediaries (GE)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-33	IFS & PEAK/VTC (H.K)	Employee Benefits - Travel Insurance	3	01 Mar 2018 - 28 Feb 2019	Insurance Intermediaries (GE)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-34	IFS & PEAK/VTC (H.K)	Health Insurance - Medical Knowledge of Critical Illness	3	01 Mar 2018 - 28 Feb 2019	Insurance Intermediaries (GE+LI)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-35	AIA International Limited	Central Provident Fund and Retirement Scheme Workshop	3	01 May 2018 - 30 Apr 2019	In-house + Commissioning Body	Mr. David Lo (+853) 8988 1821
INS-CPD-2018-36	AIA International Limited	Principles and Practice of Insurance	3	01 May 2018 - 30 Apr 2019	In-house + Commissioning Body	Mr. David Lo (+853) 8988 1821
INS-CPD-2018-37	Macau Institute of Financial Services	Professional Liability Insurance	6	01 May 2018 - 30 Apr 2019	Insurance Intermediaries (GE)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-38	Macau Institute of Financial Services	Legal Entity Course Series *	12	01 May 2018 - 30 Apr 2019	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-39	AXA China Region Insurance Company (Bermuda) Limited	Basic Financial Planning*	10	01 Jun 2018 - 31 May 2019	In-house + Commissioning Body + Corporate Agents & Brokers	Mr. Tom So (+853) 8799 3626

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INS-CPD-2018-40	Macau Institute of Financial Services	Insurance Underwriting Management	5	01 Jun 2018 - 31 May 2019	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-41	Manulife (International) Limited	MOA - Initial Training Course	33	01 Jun 2018 - 31 May 2019	In-House (Contracted Insurance Agent)	Ms. Angela Kuan (+853) 8291 9468
INS-CPD-2018-42	YouYu Global Limited	FinTech and Investment*	5.5	01 Jun 2018 - 31 May 2019	In-house + Commissioning Body + Public	Mr. Sam Zhang, (+852) 2102 2084
INS-CPD-2018-43	Macau Institute of Financial Services	Legal System for Cheques	3	01 Jul 2018 - 30 Jun 2019	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-44	IFS & PEAK/VTC (H.K)	Property and Liability Insurance Coverage for Restaurants and Catering Services	4	01 Jul 2018 - 30 Jun 2019	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-45	IFS & PEAK/VTC (H.K)	One Belt, One Road: the 21st Century Silk Road	3	01 Jul 2018 - 30 Jun 2019	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-46	IFS & PEAK/VTC (H.K)	Modern Leadership and Staff Management in Insurance Industry - Successful Delegation	3	01 Jul 2018 - 30 Jun 2019	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-47	MassMutual Asia Limited	Seminars on Financial Planning, Legal & Medical Knowledges (I)*	8	01 Aug 2018 - 31 Jul 2019	In-house + Commissioning Body + Brokers	Mr. Edmond Tse (+852) 2919 9568
INS-CPD-2018-48	Fidelidade Macau – Insurance Company Ltd.	Insurance Orientation Programme*	10	01 Aug 2018 - 31 Jul 2019	In-house + Agents of Partnered Companies	Ms. Vickie Iao (+853) 8296 8416
INS-CPD-2018-49	China Life Insurance (Overseas) Co. Ltd.	"自我突破"	5	01 Aug 2018 - 31 Jul 2019	In-house + Commissioning Body	Mr. Ray Pang (+853) 2878 7288
INS-CPD-2018-50	Macau Institute of Financial Services	Insurance Claims Management	5	01 Aug 2018 - 31 Jul 2019	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626

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INS-CPD-2018-51	Macau Institute of Financial Services	Human Resources Management*	10	01 Sep 2018 - 31 Aug 2019	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-52	Macau Institute of Financial Services	"Seminar on Facilitating the Development of Inclusive Finance and Green Finance on the Digital Silk Road:Fintech's potential positive impact" and "Seminar on Applying Blockchain in Real Business Scenarios"	2	01 Sep 2018 - 31 Aug 2019	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-53	Macau Institute of Financial Services	Macao Insurance Law Course Series*	15	01 Sep 2018 - 31 Aug 2019	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-54	IFS & PEAK/VTC (H.K)	Modern Leadership and Staff Management in Insurance Industry - High Impact Leadership	3	01 Oct 2018 - 30 Sep 2019	Insurance Intermediaries (ALL)** + Commissioning Body + Public	Ms. Kun Wai Leng (+853) 8297 2621 Mr. Hayden Lei (+853) 8297 2626
INS-CPD-2018-55	Manulife (International) Limited	Individual Underwriting	4	01 Nov 2018 - 31 Oct 2019	In-house + Manulife Contracted Insurance Agents	Mr. Ivan Wong (+853) 8291 9445