

# Postgraduate Certificate in MANAGEMENT and INSURANCE

## 管理及保險深造證書課程

專為保險經理而設 | 以功課表現評核 | 最快半年時間即可修畢

成功修畢課程，可獲取由香港大學專業進修學院頒發之學術認證  
包括：

- ▶ 「管理及保險深造證書」及
- ▶ 獲得資歷架構 6 級 及
- ▶ 保監局 10 個持續專業培訓時數

如中介人於 **2019 年 9 月 23 日** 前  
曾被保險代理登記委員會要求繼續進修指  
定資格或課程，以符合當時的有條件登記  
申請，此課程是被 **保監局認可** 的  
其中一個指定課程。

### 1 Financial Services Marketing



### 2 Management of Risk Exposure



### 3 Risk and Crisis Management



### 4 Sales Management & Leadership



### 5 Managing Channel Distribution



In Association with:

**GASSA**  
HONG KONG

2021 MARCH / INTAKE 2

**Postgraduate Certificate in Management and Insurance** is designed to develop insurance practitioners' professional competencies in insurance risk and management, which is recognized under Hong Kong Qualification Framework (HKQF) at level 6. It adopts the Specification of Competency Standards (SCS) for the insurance industry under HKQF in its curriculum design. It uses a work-based approach, equipping students with the appropriate level of skills to address the managerial and risk management aspects in the insurance industry under an increasingly stringent regulatory environment. The programme is offered in association with General Agents and Managers Association of Hong Kong (GAMAHK) which provides expert advice on the curriculum development. GAMAHK is the only organization in Hong Kong representing solely the interests of life insurance managers.

**管理及保險深造證書課程**旨在提升保險從業員在保險風險及管理方面的專業能力、培養及發展業界領袖所需的專業知識。課程內容符合保險業《能力標準說明》(SCS)，同時獲得資歷架構(HKQF)第6級認證，學術理論及實戰兼備，讓學員鞏固及全面提升保險經理的管理知識，以應對市場環境的轉變及制定營銷策略，及在日益嚴謹的監管環境下解決保險業的管理和風險管理問題。香港人壽保險經理協會(GAMAHK)是香港唯一的壽險經理協會，該計畫是與香港大學專業進修學院(HKU SPACE)合辦，由HKU SPACE提供課程及優良師資。

**ACADEMIC ACCREDITATION BY HKU SPACE 由香港大學專業進修學院頒發之學術認證**

1. HKQF Level 6 and 10 CPD hours (IA); and

2. **Postgraduate Certificate** in Management and Insurance; and

3. **An endorsement letter** jointly issued by HKU SPACE and GAMAHK.
- 資歷架構 6 級及 保監局 10 個持續專業培訓時數 [registration no: 18/000067/L6] ; 及

管理及保險深造證書; 及

香港大學專業進修學院和 GAMAHK 聯名確認信。

**ENROLMENT FEE 報名費用**

**HK\$ 20,000 港幣 20,000 元**

**COURSE MODULES & DURATION 課程單元及時數**

**5 modules** (18 hours/module) for a total of **90 hours**      **5 個單元** (18 小時 / 單元) · 合共 **90 小時**。

**ASSESSMENT METHODS 評核方式**

1. 1,500 - 2,000 words individual report/module (in Eng); and

2. At least 70% overall attendance, with at least 12 hours/module.
- 1,500 – 2,000 字個人報告(英文) / 單元; 及

整體出席率達 70 % 及每單元出席率達 12 小時。

**ENTRY REQUIREMENTS 入學要求# 申請者必須提供入學要求的相關證明，以供審核。**

1. A member of GAMAHK 2021; and

2. 5 years of full-time work experience in related managerial position

**OR** Nominated by GAMAHK of whom was considered eligible

**OR** A bachelor's degree holder.
- 必須為 GAMAHK 2021 年度之會員; 及

5 年相關全職管理工作經驗

**或**由 GAMAHK 認可合資格修讀此課程之人士

**或**持有學士學位。

# Applicants with other qualifications and relevant work experience will be considered on individual merit.

具備其他認可資格或相關工作經驗的申請人，亦將予以考慮。  
For Non-local applicants, please also submit the required document(s) issued by the Hong Kong Immigration Department.  
非本地申請人必須同時提交由入境事務處發出可於香港就讀的許可文件。

**TUTORS 導師**

1. Ms. Betty LO, BSW PolyU HK, MEd Nott. MBA Wales, MCIM, MIHRM, BSW
2. Mr. Kegan CHAN, BBA UC, MBA HKU

| Module 單元                                     | Course Outline 課程大綱  |   | Date 日期  | Details 詳情   |
|---|--|---|--|--|
| 1<br>Management of Risk Exposure<br>風險預防管理    | <div><div>▶ An Overview of the Functions and Theory of Insurance</div><div>▶ Nature of Risk and Uncertainty</div><div>▶ Regulatory Requirements on Risk Exposures, Reserves, Liquidity and Solvency in Hong Kong</div><div>▶ Risk Management Principles and Process</div><div>▶ Risk Analysis and Evaluation</div><div>▶ Risk Responses and Risk Treatment</div></div>   | <div>保險的功能與理論綜述</div> <div>風險及不明朗因素的性質</div> <div>香港風險承擔力、儲備、流動性和償付能力的監管要求</div> <div>風險管理原則和流程</div> <div>風險分析與評估</div> <div>風險應對和風險處理</div>   | <div>12 MAR 2021 (FRI)</div> <div>13 MAR 2021 (SAT)</div> <div>27 MAR 2021 (SAT)</div> |  |
| 2<br>Risk & Crisis Management<br>危機及風險管理      | <div><div>▶ Crisis Risk Management</div><div>▶ Crisis Management &amp; Communications</div><div>▶ Business Continuity Management</div><div>▶ Drivers for Crisis Management</div><div>▶ Contingency Planning &amp; Crisis Preparedness</div><div>▶ Risk Management Process, Risk Strategy &amp; Framework</div><div>▶ Risk Culture, Appetite &amp; Tolerance</div><div>▶ Calculation Risk Tolerance (NEW)</div><div>▶ Risk &amp; Organizations</div><div>▶ Risk Assurance &amp; Reporting</div></div> | <div>危機及風險管理</div> <div>危機管理與溝通</div> <div>業務連續性管理</div> <div>危機管理的驅動力</div> <div>應急計劃和防備</div> <div>風險管理流程、策略和框架</div> <div>風險意識文化、風險評估與可承受能力</div> <div>計算可承受風險 (新)</div> <div>風險與組織</div> <div>風險評估和報告</div> | <div>9 APR 2021 (FRI)</div> <div>10 APR 2021 (SAT)</div> <div>24 APR 2021 (SAT)</div>  | <div>Time 時間</div> <div>12:15 – 18:15</div> <div>Location 地點</div> <div>Island East Campus / *Virtual</div> <div>港島東分校 / *線上</div> |
| 3<br>Financial Services Marketing<br>財金服務營銷   | <div><div>▶ Introduction to Services</div><div>▶ Customer Expectations of Services</div><div>▶ Customer Perceptions of Service</div><div>▶ Customer-Defined Services Standards</div><div>▶ Integrated Services Marketing Communications</div></div>  | <div>財金服務營銷簡介</div> <div>客戶對服務的期望</div> <div>客戶對服務的看法</div> <div>客戶定義之服務標準</div> <div>綜合服務營銷傳播</div>  | <div>7 MAY 2021 (FRI)</div> <div>8 MAY 2021 (SAT)</div> <div>22 MAY 2021 (SAT)</div>   | <div>Address 地址</div> <div>IEC903, 9/F,</div> <div>494 King's Road,</div> <div>North Point, Hong Kong.</div>                       |
| 4<br>Sales Management & Leadership<br>銷售管理與領導 | <div><div>▶ Introduction to Strategic Leadership</div><div>▶ Heart-winning Strategies</div><div>▶ Sales Management – Introduction</div><div>▶ What Salespeople Feel in their Hearts</div><div>▶ Sales Performance Evaluation: Evaluation Criteria (Calculation of sales, accounts, profit, calls, and expenses) (NEW)</div></div>  | <div>策略領導簡介</div> <div>贏得民心的領導策略</div> <div>銷售管理簡介</div> <div>前線銷售人員的感受</div> <div>評核銷售表現：評核準則包括計算銷售、帳戶、利潤、致電客戶次數及成本 (新)</div>  | <div>4 JUN 2021 (FRI)</div> <div>5 JUN 2021 (SAT)</div> <div>19 JUN 2021 (SAT)</div>   | <div>香港北角</div> <div>英皇道 494 號</div> <div>9 樓 903 室</div>  |
| 5<br>Managing Channel Distribution<br>分銷管理    | <div><div>▶ Typical Challenges that Managers Face in 21st Century</div><div>▶ Global Logistics and Channel Decisions</div><div>▶ Marketing Management Audit and Control</div><div>▶ Insurance Company Operations</div><div>▶ Types of Insurers and Marketing Systems</div><div>▶ Government Regulation of Insurance</div></div>  | <div>21 世紀管理人面臨的典型挑戰</div> <div>全球後勤及分銷途徑決策</div> <div>營銷管理審計與監控</div> <div>保險公司營運模式</div> <div>保險公司和營銷系統的類型</div> <div>政府對保險業的監管</div>   | <div>9 JUL 2021 (FRI)</div> <div>10 JUL 2021 (SAT)</div> <div>24 JUL 2021 (SAT)</div>  |  |

\*Class may be conducted via ZOOM due to COVID-19. 或因應疫情改以 ZOOM 上課。

Disclaimer: Terms and conditions are subject to change without prior notice. GAMAHK reserves the right to interpret and amend the regulations and details of the programme. HKU SPACE is the course provider which responsible for ensure the course content and tutor(s) are qualified and meet the standard.



(圖片及資料來源：香港資歷架構網站)  
MIM is not related to Hong Kong Qualification Framework.



# Postgraduate Certificate in Management and Insurance

## 管理及保險深造證書課程 MARCH 2021 / Intake 2

### Enrolment Form 報名表格

**Personal Details 個人資料** 《Please fill out the form in block letters with information as on ID / Passport 請根據身份證/護照上資料並以正楷填寫》

|                                  |                                   |                |               |
|----------------------------------|-----------------------------------|----------------|---------------|
| Name<br>姓名：                      | (中文)                              | (English)      |               |
| ID / Passport No.<br>身份證 / 證件號碼： | GAMAHK Member No.<br>GAMAHK 會員號碼： |                | Gender<br>性別： |
| Company<br>公司：                   | Title<br>職銜：                      |                | F / M         |
| Address<br>公司地址：                 |                                   |                |               |
| Office Tel. No.<br>公司電話：         | Mobile No.<br>手提電話：               |                |               |
| WhatsApp No.：                    |                                   | *E-mail<br>電郵： |               |

\*Please provide the correct email address to receive confirmation 電郵地址將用作報名確認通知，敬請務必填寫正確資料

**Highest Education Level / Other Professional Attainments 最高學歷 / 其他行業資格或認證**

|  |  |  |   |   |
|--|--|--|---|---|
| <input type="checkbox"/> Secondary or below<br>中學程度或以下 | <input type="checkbox"/> Form 5 or equivalent<br>中五或同等學歷 | <input type="checkbox"/> Form 6, Form 7 or equivalent<br>中六、七或同等學歷                   | <input type="checkbox"/> Certificate / Diploma<br>證書/文憑 | <input type="checkbox"/> Higher Certificate / Higher Diploma<br>高級證書/文憑 |
| <input type="checkbox"/> Associate Degree<br>副學士       | <input type="checkbox"/> Bachelor's Degree<br>學士學位       | <input type="checkbox"/> Professional Attainments (please specify)<br>行業資格/認證 (請註明)： |   |   |

**Work Experience 工作經驗** 《Please submit supporting documents, e.g. copies of reference letter 需連同申請表格提交證明文件，例如介紹信副本》

Do you have at least **5 years** of full-time work experience at managerial level in related industries? Yes ☐  
 您是否擁有至少 **5 年** 相關行業全職管理工作經驗？ 是 ☐

**Introducer 介紹人** 《Please provide the name and title of the person who first introduce you to apply for this course 請填寫介紹閣下就讀此課程的人士名稱及職銜》

|             |              |
|-------------|--------------|
| Name<br>姓名： | Title<br>職銜： |
|-------------|--------------|

**Payment Method 付款方式** 《Transaction in HKD. Interbank exchange rate depends on the bank's exact remittance day 費用以港幣結算，外地信用卡將以當日銀行匯率計算》

|                           |   |             |                     |                         |
|---------------------------|---|-------------|---------------------|-------------------------|
| Cheque<br>支票              | Payable to 支票抬頭<br>"GAMAHK Ltd."  | Bank<br>銀行： | Cheque No.<br>支票號碼： | Amount<br>金額：HKD 20,000 |
| Credit Card<br>信用卡        | <input type="checkbox"/> VISA <input type="checkbox"/> MasterCard<br>* 如欲以 UnionPay (銀聯卡) / American Express (美國運通卡) / Alipay (支付寶) 或 WeChat Pay (微信支付) 付款，請於協會網頁 <a href="http://www.gama.com.hk/event-list/">www.gama.com.hk/event-list/</a> 辦理。<br>* 網上付款後，請將「付款成功通知」電郵副本連同此報名表格一併交回，以供核實。 |             |                     |                         |
| Credit Card No.<br>信用卡號碼： | Expiry Date<br>屆滿日期： / (MM/YY)  |             |                     |                         |
| Card Holder<br>持卡人姓名：     | Amount<br>金額：HKD 20,000   |             |                     |                         |
| Signature<br>持卡人簽署：       | Date<br>日期：   |             |                     |                         |

| GAMAHK Office Use | Terms and Conditions 條款及細則   |
|-------------------|--|
| Auth. Code        | <p>➢ 凡以信用卡付款，請將報名表傳真至 <b>2832 9822</b> / 電郵至 <a href="mailto:education@gama.com.hk">education@gama.com.hk</a> 報名。</p> <p>➢ 如以支票付款，須將報名表格連同支票郵寄至：<br/> <b>北角英皇道 338 號華懋交易廣場二期 17 樓 1705-6 室</b>，並請確保郵資足夠。<b>郵資不足者，報名將不獲處理。</b></p> <p>➢ <b>申請者需將所有相關學歷或工作證明副本連同此報名表格一併交回本會。</b>協會有關要求申請者提供更多資料，以供審核。</p> <p>➢ 成功報名之人士將獲電郵通知確認。課程具體安排將於開課前約一星期由 HKU SPACE 提供。<b>如於開課前 7 天內仍未收到確認通知或開課安排，請致電協會 (2893 9699) 向專業發展中心職員查詢。</b></p> <p>➢ 名額有限，額滿即止。<b>申請一經協會確認批核，所有款項恕不退還。</b></p> <p>➢ 報讀此課程時即同意協會有關或授予相關機構，即 HKU SPACE，於審核及課程進行期間攝影、錄影、錄音、直播，以作公告、宣傳、刊登於網站、刊物及相關媒體之用。</p> <p>➢ 課程所有內容均為導師之個人意見分享，大會將不會就其內容及所引起或構成之任何事項負責。</p> <p>➢ 如遇 8 號颱風訊號、黑色暴雨警告懸掛，或其他不可抗力因素（如因疫情影響需關閉上課處所 / 需遵守政府頒布之限聚令），協會將保留取消或更改上課日期或形式之權利。</p> <p>➢ 協會保留修訂課程內容、上課形式及其他一切更改或解釋上述細則及條款之權利。</p> |
| Date              |  |
| Control No.       |  |
| Handled By        |  |
| Receipt No.       |  |

**Declaration 聲明**

本人，下述簽署人，已細閱及明白以上之所有條款及細則，並清楚明白一經登記報名此課程，本人的個人資料將按香港人壽保險經理協會 (GAMAHK) 的程序被用於與該課程相關一切之用途。本人同時明白將來可能收到 GAMAHK 的課程或活動資訊，並明白在課程或活動中不能作出任何招募或有私人利益之行徑。

如不欲從 GAMAHK 收取資訊，請於此空格 ☐ 內以「✓」表示。

Date 日期：\_\_\_\_\_ Signature of Applicant 申請人簽署：\_\_\_\_\_

成功修畢課程  
額外獲取：



APPLY NOW



POWERED BY GAMA HK

# MASTER OF INSURANCE MANAGEMENT

ELITE · ACADEMIC · PROFESSIONAL

## Boost Your Career

**Master of Insurance Management (MIM)** is the recognized designation and respected credential awarded by GAMA HK.

MIM qualified designee is considered as acquiring solid and practical academics, and is eligible to master the insurance management proficiency.

To secure the designation, applicant must be:

- ▶ Existing member of GAMA HK; and
- ▶ Successfully completed Postgraduate Certificate in Management and Insurance offered by HKU SPACE in association with GAMA HK; and
- ▶ In the position of managerial grade or above in the insurance profession.

MIM qualified designee is authorized to use the MIM mark on their resumes, whilst be granted a certificate and delicate business card.

**保險管理大師 (MIM)** 代表著優越、專業及具有高等學術程度的保險管理精英指標。

要成為 MIM，必須：

- ▶ 成為 GAMA HK 當年度會員；及
- ▶ 成功修畢管理及保險深造證書課程；及
- ▶ 現職保險業界經理或管理級別。

合資格之 MIM，將獲頒發證書及名片，並獲授權於個人履歷及名片上使用 MIM 標誌。

## CONTACT US:



香港人壽保險經理協會

The General Agents and Managers Association of Hong Kong

香港北角英皇道 338 號華懋交易廣場二期 17 樓 1705-6 室

電話：(852) 2893 9699 | 傳真：(852) 2832 9822 | 電郵：info@gama.com.hk