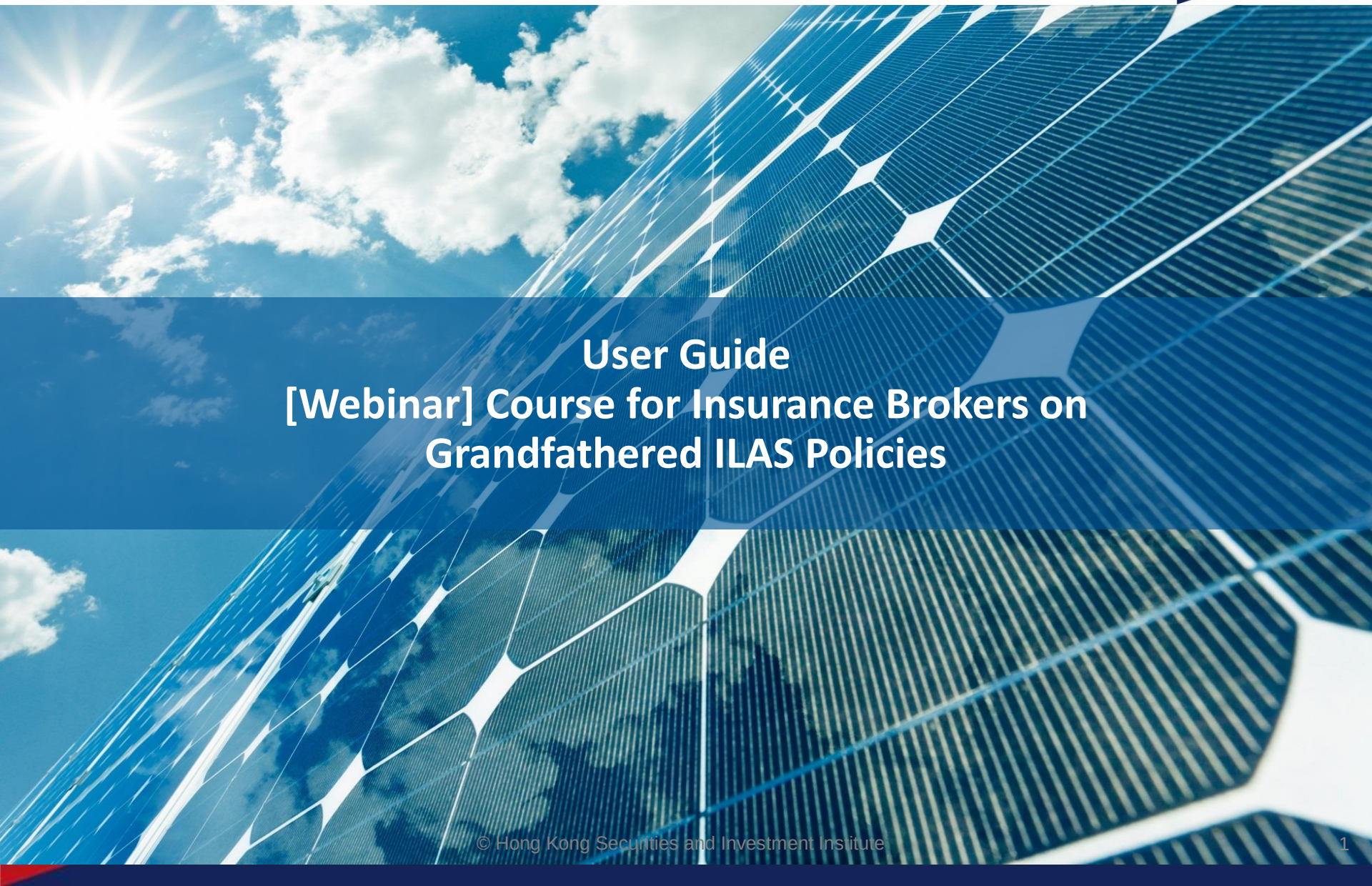

User Guide
[Webinar] Course for Insurance Brokers on Grandfathered ILAS Policies

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Overview

- This is the Course for Insurance Brokers on Grandfathered ILAS Policies.
- This course is recognised by the IA under the Grandfathering Arrangements and equips licensed insurance brokers with the necessary technical knowledge to continue providing advisory investment services or discretionary investment management services.
- For this training, you are required to:
  - Login to your personal account and launch the webinar on the HKSI Institute Online Portal.
  - During the class, you must keep the camera on, and stay in front of the camera, otherwise the CPT / CPD / OPT hours will be deducted.
  - Attend the entire webinar session including Q&A.
  - Attempt the polling questions during the webinar.

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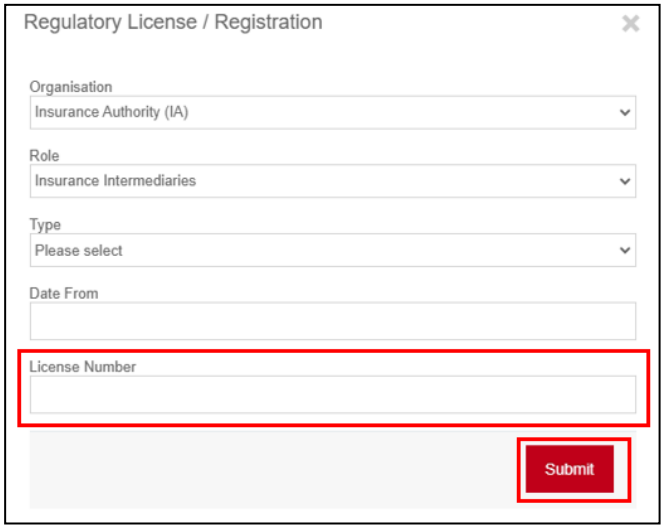
Account Creation

- If you are an LE exam candidate who enrolled in the exam between 1 January 2015 and 27 September 2017, or if you are an active individual member, please activate your previous account.
- For new users, please create your personal account on our Online Portal.
- Please visit the Account Creation Video for further instructions on account creation and activation.
- For IA licensees, please remember to input your "**License Number**" on **"Regulatory License / Registration"** under PROFILE on Online Portal.



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Account Creation (con't)

- Please also update your employment information on "**Current Employment**" under "PROFILE".

- Enter your current company and filling the remaining employment information and press "**Save**". (Below is an example.)

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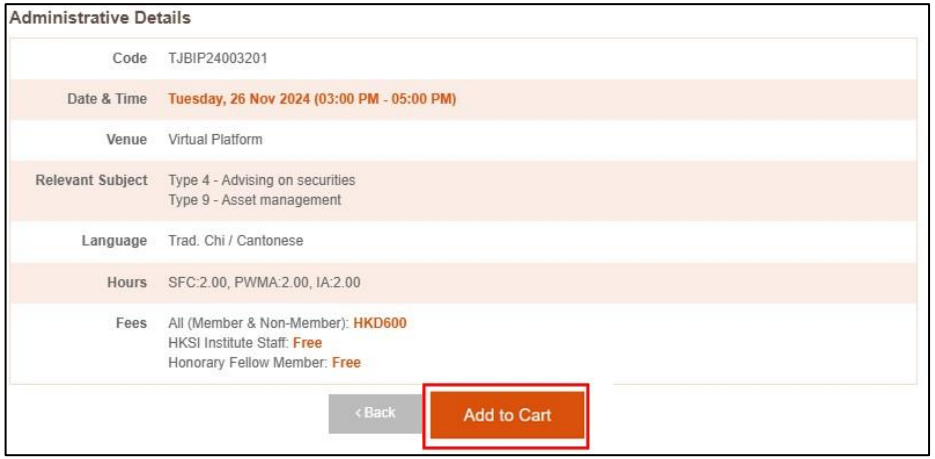
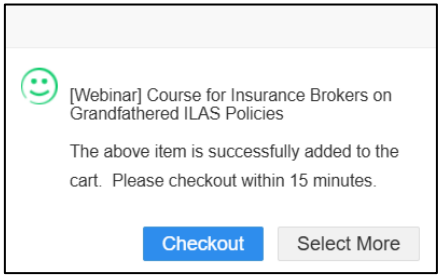
Course Enrolment

- Go to the course page
- Click **“APPLY ONLINE”** and then click on **“Add to Cart”**



- Login to the Online Portal and checkout within 15 minutes



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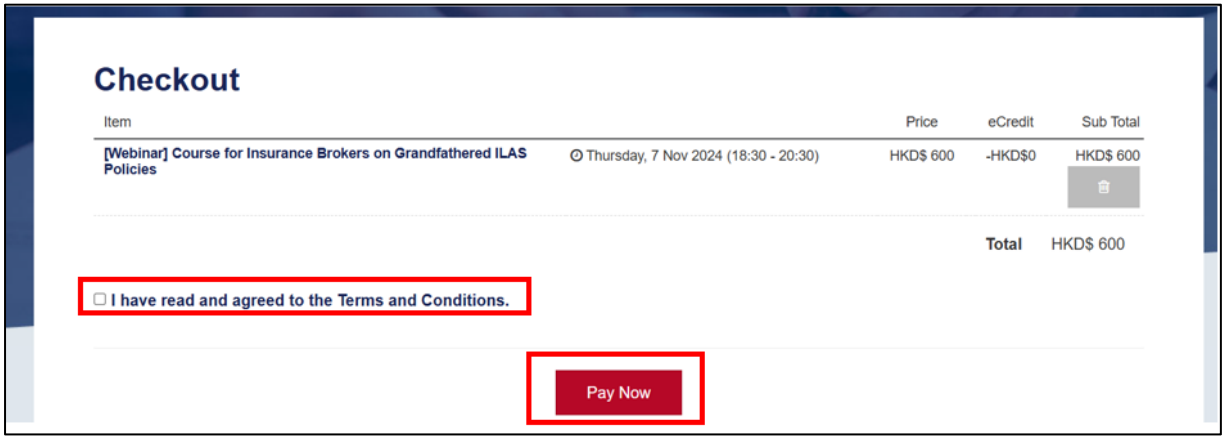
Course Enrolment (con't)

- Make sure the course name and price are accurate, read the Terms and Conditions, then tick the checkbox and click **"Pay Now"**.



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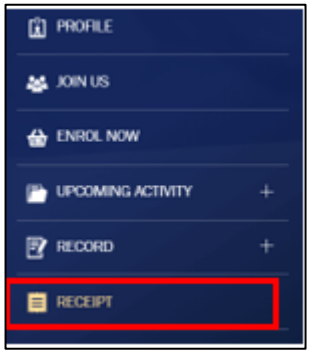
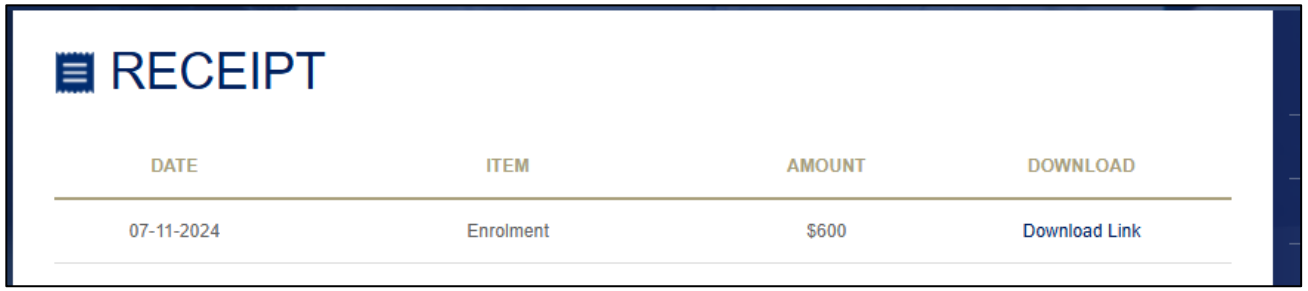
Course Enrolment (con't)

- After completing the enrolment, please complete the following actions:

1. Download the receipt on the online portal. (Below is an example)





2. Check the enrolment by clicking on **"CPT/Non-CPT Activity"** under the **"UPCOMING ACTIVITY"** tab to check the enrolled course.

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Download and Install via "Zoom - One Platform To Connect App" app

- To join the webinar, you are required to install the Zoom Meeting App (click here for installation instructions for computer and mobile device)
- If you are a first-time Zoom user, please download the app at least 20 minutes before the event to avoid delays.
- Click here to test if Zoom works on your device.
- Make sure you have your speaker or headphone plugged in and enabled.

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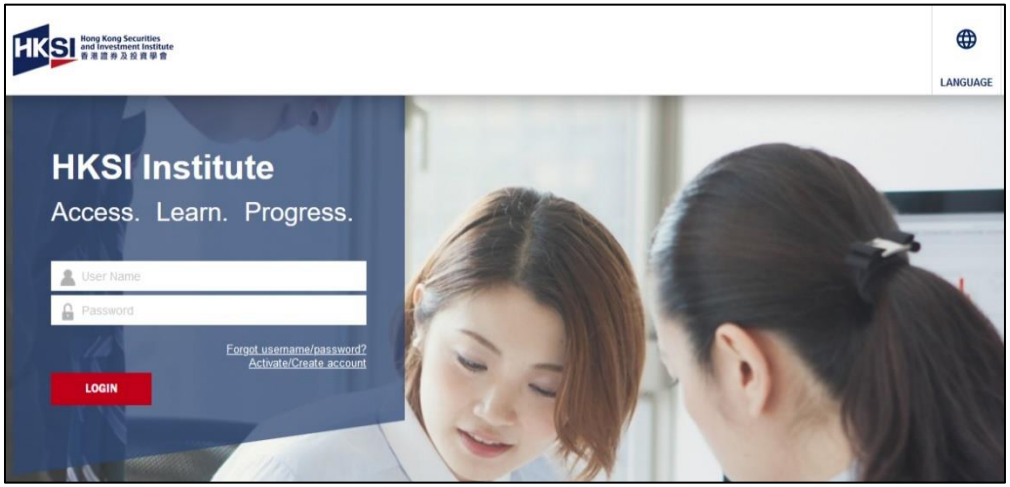
Login via HKSI Institute Portal

- On the event day, login to the HKSI Institute Online Portal: https://login.hksi.org/login by using your own username and password.
- Click on **“CPT/Non-CPT Activity”** under UPCOMING ACTIVITY tab.
- Click the **“Launch Online”** button which will appear **ONLY 30 minutes before** the session starts. This button will direct you to the Zoom platform for your enrolled webinar session.



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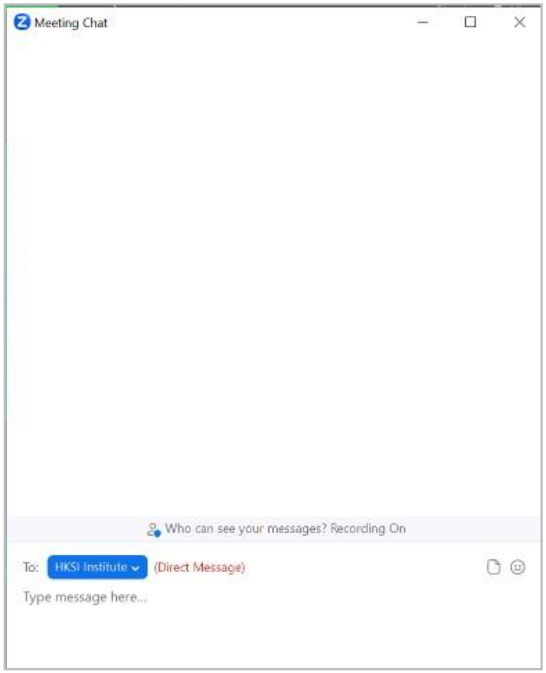
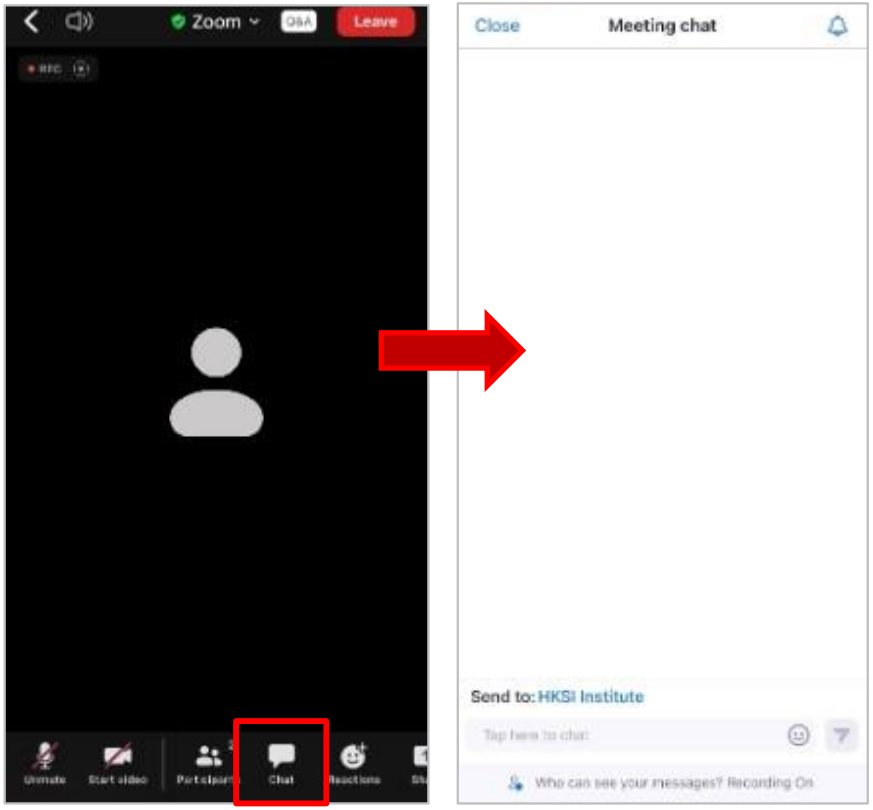
If You Need Assistance, Use the Chat Function

Computer



Mobile/Tablet



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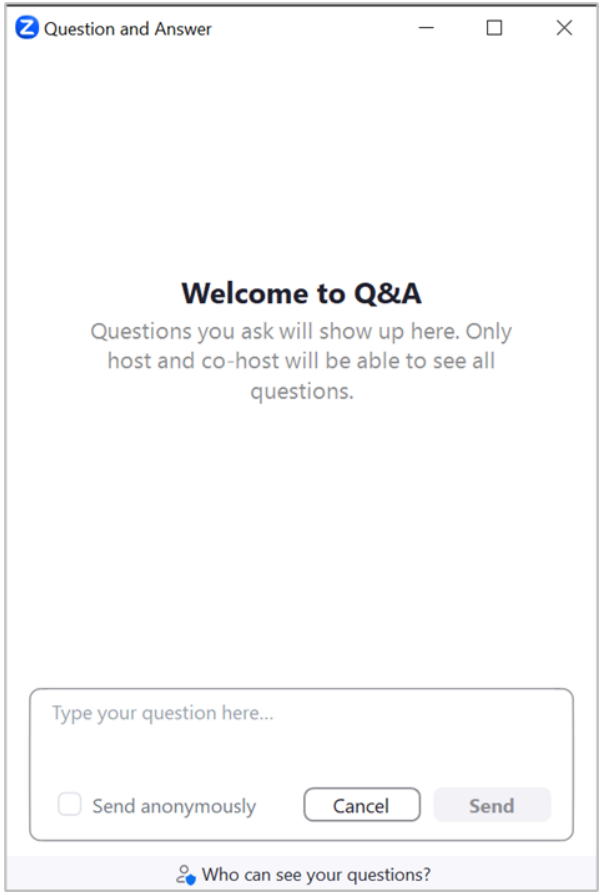
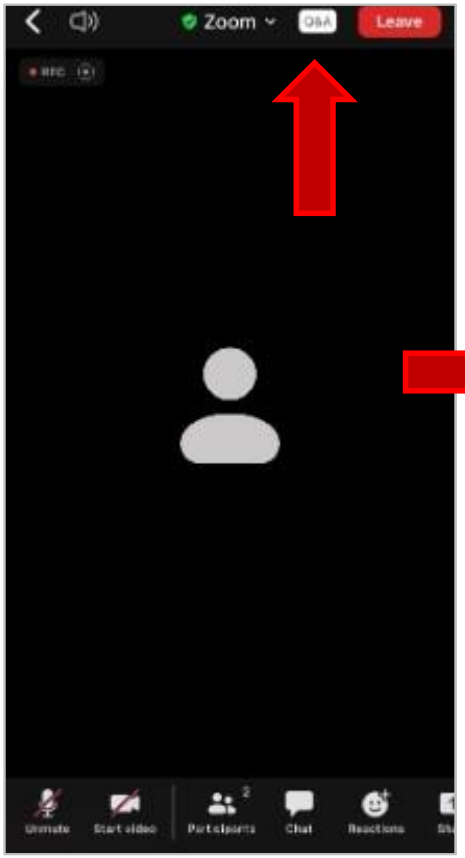
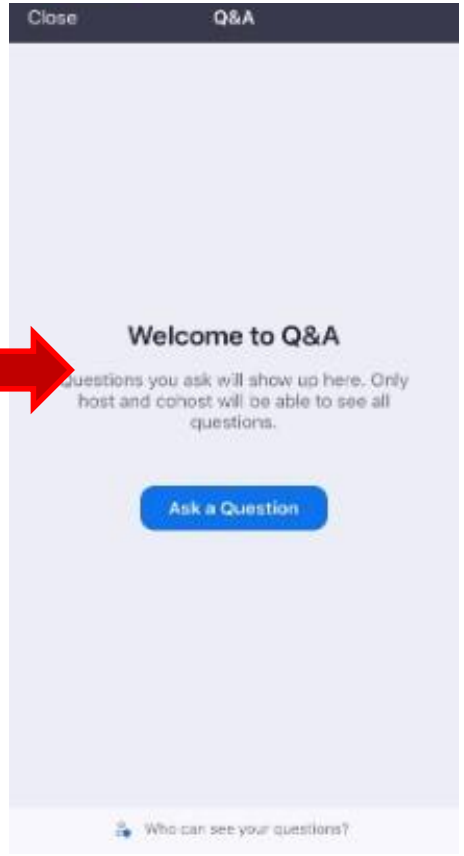
To Ask Questions – Use the Q&A Function

Computer



Mobile/Tablet





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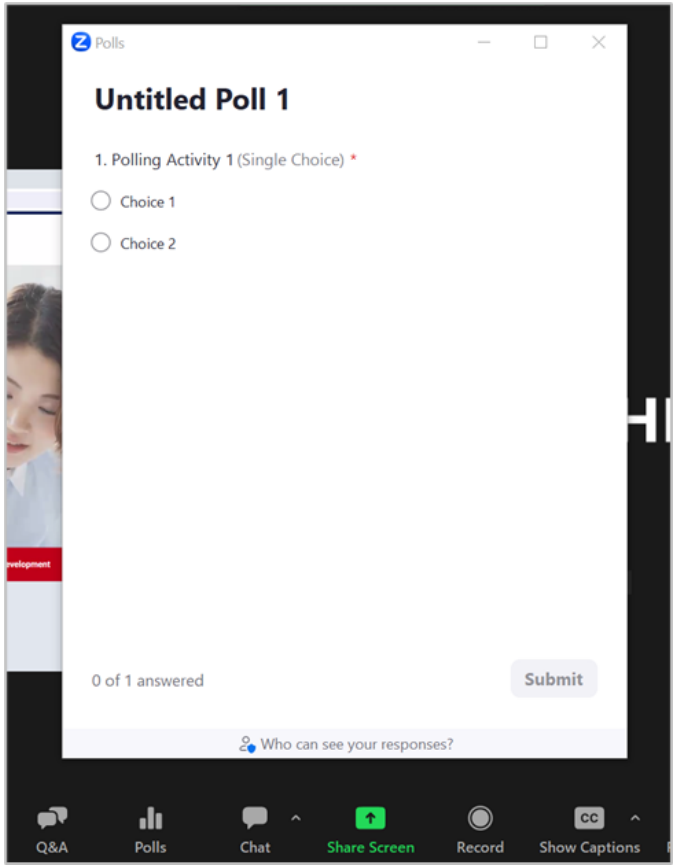
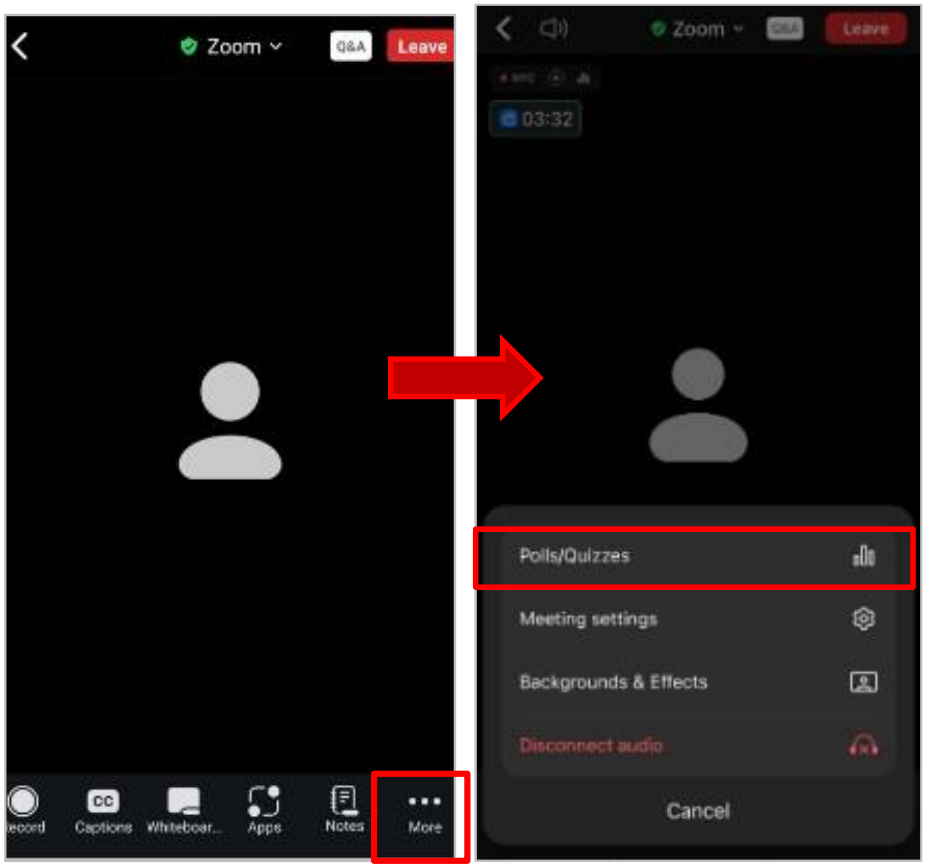
Polling Feature

Polling function on a computer



Polling function on a mobile/tablet



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Download the Certificate of Attendance

- Login to online portal (https://login.hksi.org/)
- Click on "**CPT Activity**" under **RECORD**

- Please select your completion date in the calendar and then press SEARCH button to view the activity record(s)

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Download the Certificate of Attendance (con't)

- In the search results, locate the course and click "Print" to print the certificate. (Below is an example only.)

NAME	DATE	CPT / CPD / CPE / OPT GAINED	ATTENDANCE RECORD	
[Webinar] Course for Insurance Brokers on Grandfathered ILAS Policies	26-11-2024	2 SFC 2 PWMA 2 IA	Print	More

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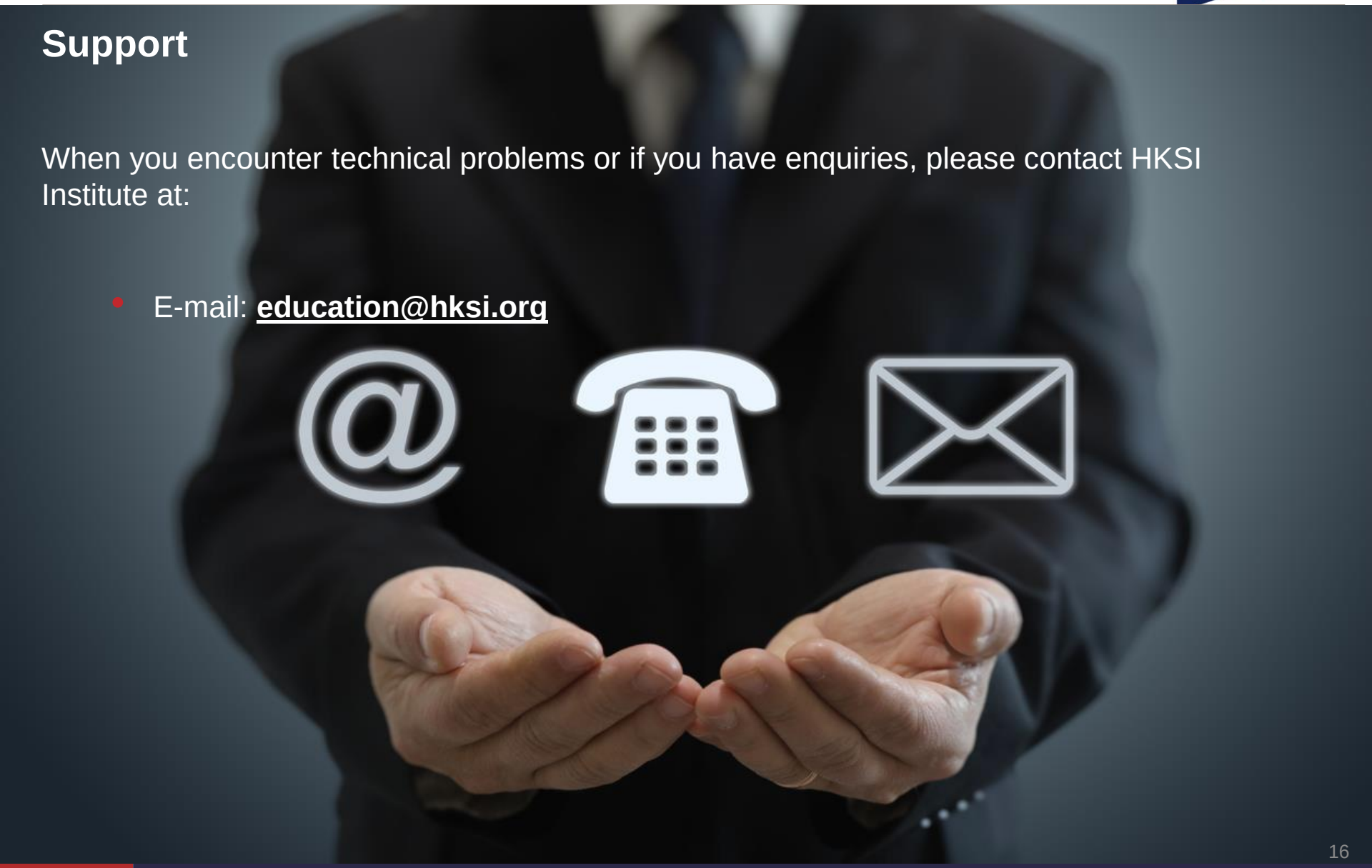
Support

When you encounter technical problems or if you have enquiries, please contact HKSI Institute at:

- E-mail: **education@hksi.org**