

A low-angle, upward-looking photograph of a modern glass skyscraper. The building's facade is composed of many rectangular glass panels that reflect the sky and clouds. The sun is visible in the upper left corner, creating a bright lens flare. The sky is a vibrant blue with scattered white clouds. A semi-transparent dark blue horizontal band is overlaid across the middle of the image, containing the title text.

User Guide

[Webinar] Course for Insurance Brokers on Grandfathered ILAS Policies

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- 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.

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.

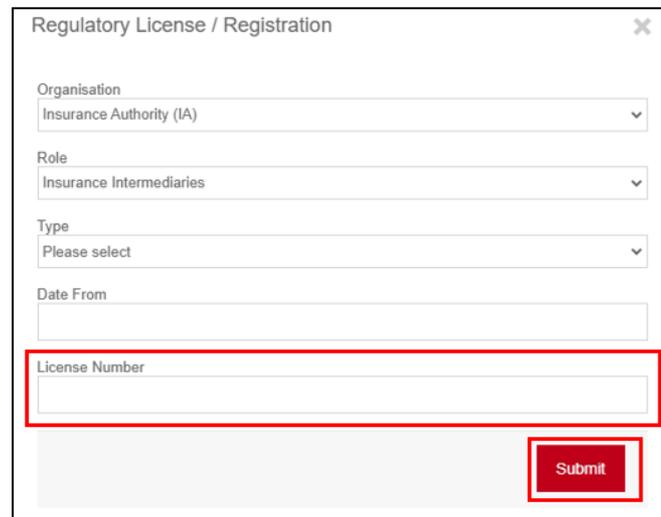


PROFILE

- Education
- Personal Particulars
- Address
- Phone
- Email
- Current Employment
- Education
- Professional Qualifications
- Professional Memberships
- Regulatory License / Registration**

PROFILE

- JOIN US
- ENROL NOW
- UPCOMING ACTIVITY +
- RECORD +
- RECEIPT
- ECREDIT
- COMMUNICATION PREFERENCE
- EFORM
- CONTACT US



Regulatory License / Registration

Organisation
Insurance Authority (IA)

Role
Insurance Intermediaries

Type
Please select

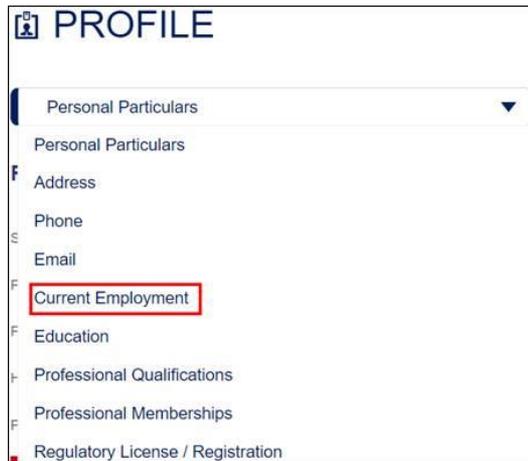
Date From

License Number

Submit

Account Creation (con't)

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



The screenshot shows a vertical menu titled "PROFILE" with a list of options. The options are: Personal Particulars, Address, Phone, Email, Current Employment (highlighted with a red box), Education, Professional Qualifications, Professional Memberships, and Regulatory License / Registration.

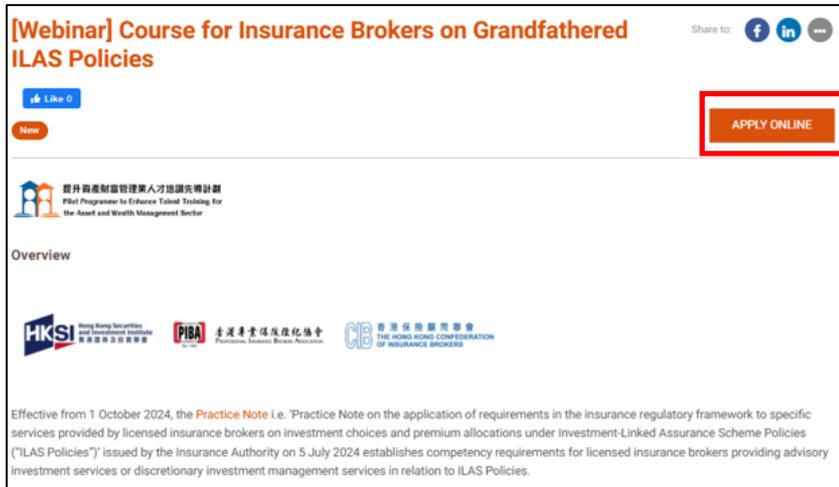
- Enter your current company and filling the remaining employment information and press “**Save**”. (Below is an example.)



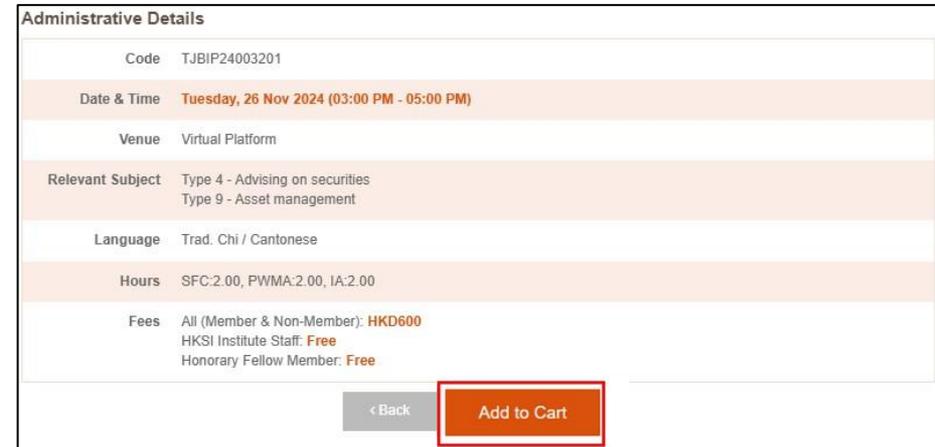
The screenshot shows the "Current Employment" form. It features a red "SAVE" button at the top. Below the button, there are three input fields: "Company Name (English)" with the value "HKSI", "Date From" (empty), and "Date To" (empty). The text "Hong Kong Securities and Investment Institute (香港證券及投資學會) (HKSI Institute)" is visible below the first input field.

Course Enrolment

- Go to the [course page](#)
- Click “**APPLY ONLINE**” and then click on “**Add to Cart**”



The screenshot shows the course page with the title "[Webinar] Course for Insurance Brokers on Grandfathered ILAS Policies". It includes a "Like 0" button, a "New" badge, and a red-bordered "APPLY ONLINE" button. Below the title is a logo for the "Pilot Programme to Enhance Talent Training for the Asset and Wealth Management Sector". The "Overview" section features logos for HKSI, PIBA, and the Hong Kong Confederation of Insurance Brokers. A note at the bottom states: "Effective from 1 October 2024, the Practice Note i.e. 'Practice Note on the application of requirements in the insurance regulatory framework to specific services provided by licensed insurance brokers on investment choices and premium allocations under Investment-Linked Assurance Scheme Policies ('ILAS Policies') issued by the Insurance Authority on 5 July 2024 establishes competency requirements for licensed insurance brokers providing advisory investment services or discretionary investment management services in relation to ILAS Policies."

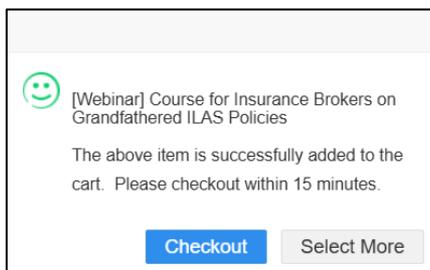


The screenshot shows the "Administrative Details" section with the following information:

Code	TJBIP24003201
Date & Time	Tuesday, 26 Nov 2024 (03:00 PM - 05:00 PM)
Venue	Virtual Platform
Relevant Subject	Type 4 - Advising on securities Type 9 - Asset management
Language	Trad. Chi / Cantonese
Hours	SFC:2.00, PWMA:2.00, IA:2.00
Fees	All (Member & Non-Member): HKD600 HKSI Institute Staff: Free Honorary Fellow Member: Free

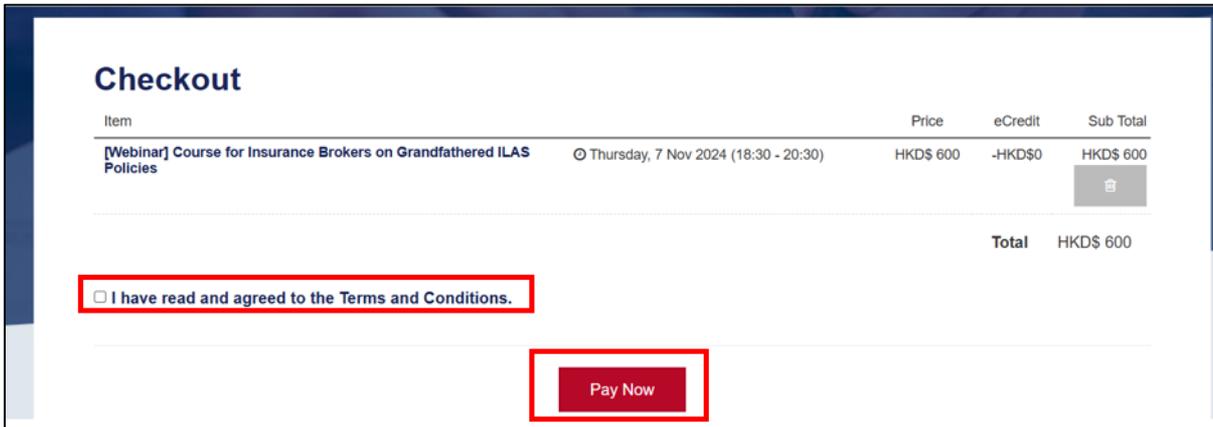
At the bottom right, there is a "< Back" button and a red-bordered "Add to Cart" button.

- Login to the Online Portal and checkout within 15 minutes



The screenshot shows a confirmation message with a green smiley face icon. The text reads: "[Webinar] Course for Insurance Brokers on Grandfathered ILAS Policies. The above item is successfully added to the cart. Please checkout within 15 minutes." At the bottom, there are two buttons: "Checkout" and "Select More".

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



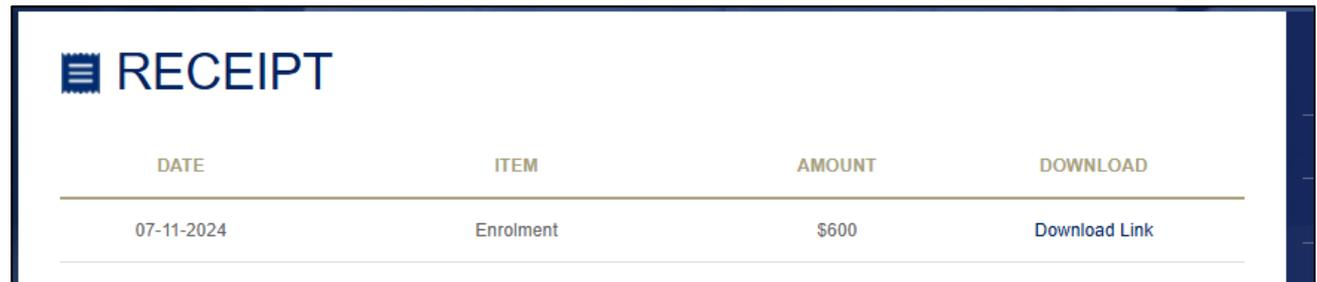
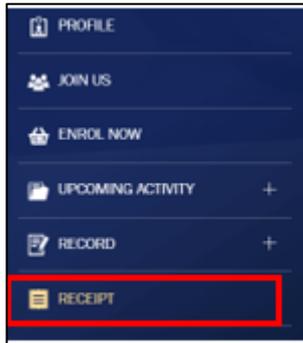
Checkout

Item	Price	eCredit	Sub Total
[Webinar] Course for Insurance Brokers on Grandfathered ILAS Policies	HKD\$ 600	-HKD\$0	HKD\$ 600
			
Total			HKD\$ 600

I have read and agreed to the Terms and Conditions.

Pay Now

- After completing the enrolment, please complete the following actions:
 1. Download the receipt on the online portal. (Below is an example)



DATE	ITEM	AMOUNT	DOWNLOAD
07-11-2024	Enrolment	\$600	Download Link

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



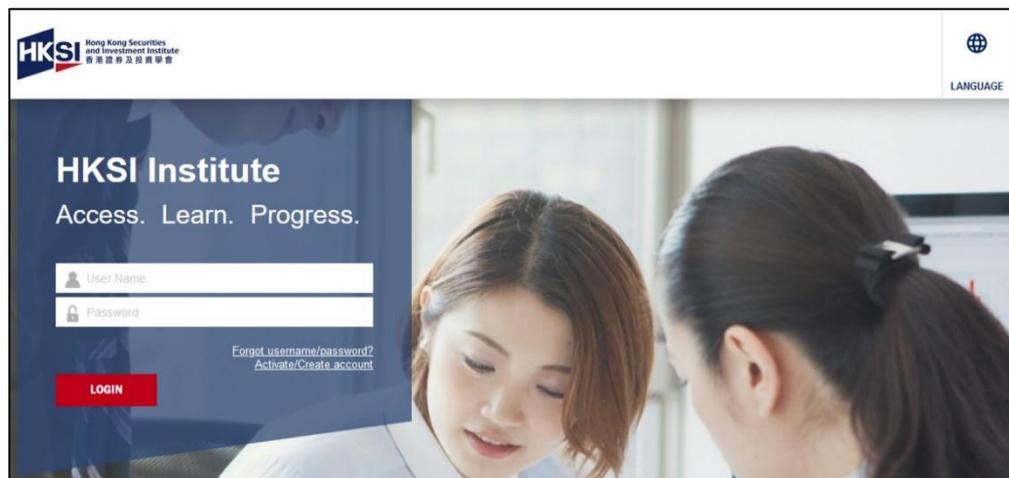
Download and Install via "Zoom - One Platform To Connect App" app



- 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.

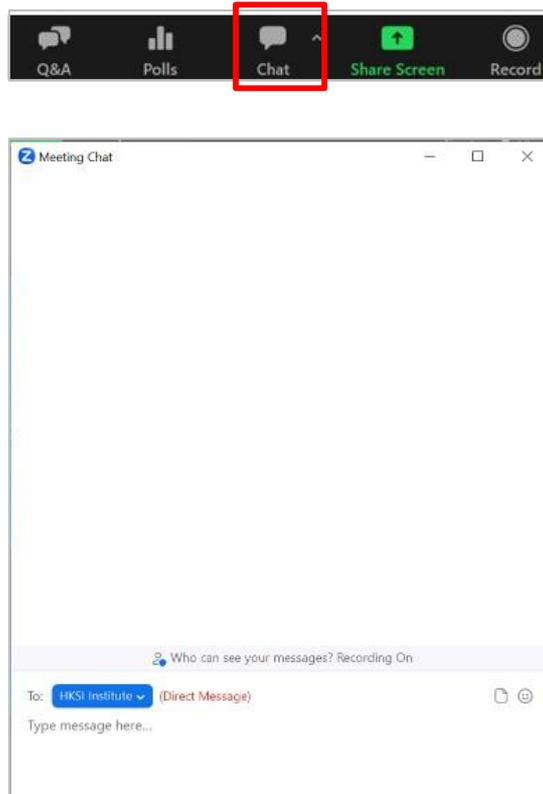
Login via HKSI Institute Portal

- 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.

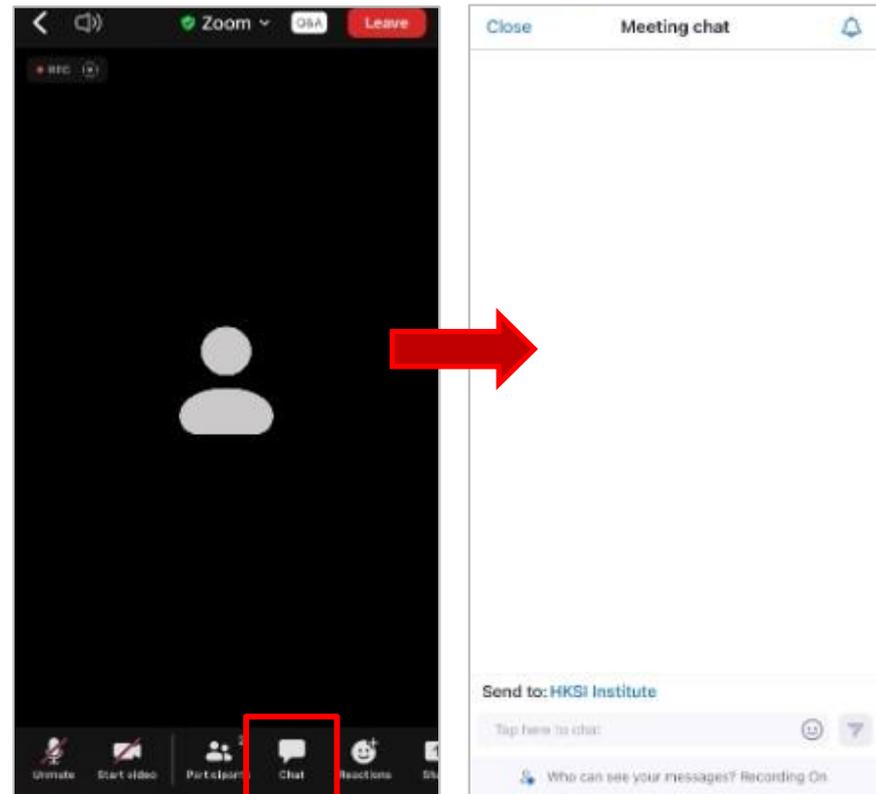


If You Need Assistance, Use the Chat Function

Computer

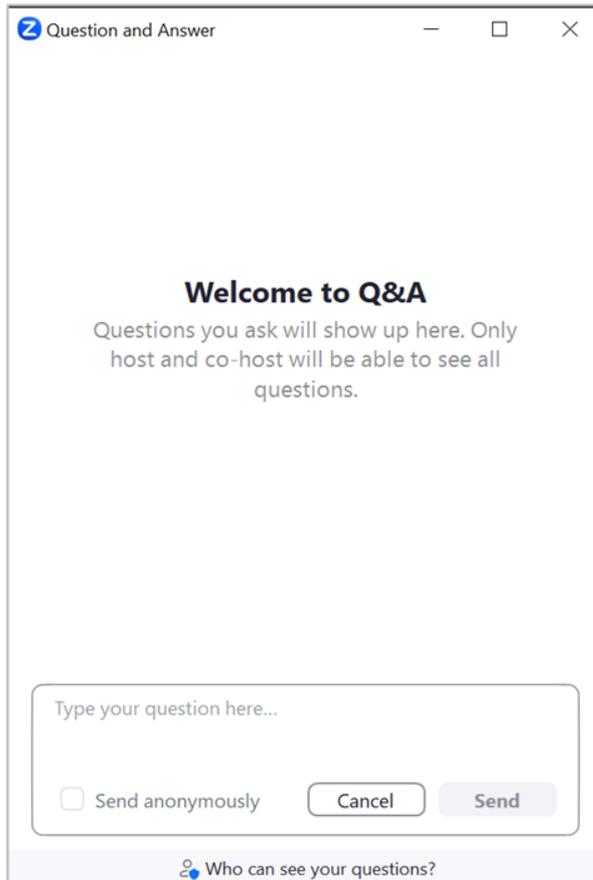


Mobile/Tablet

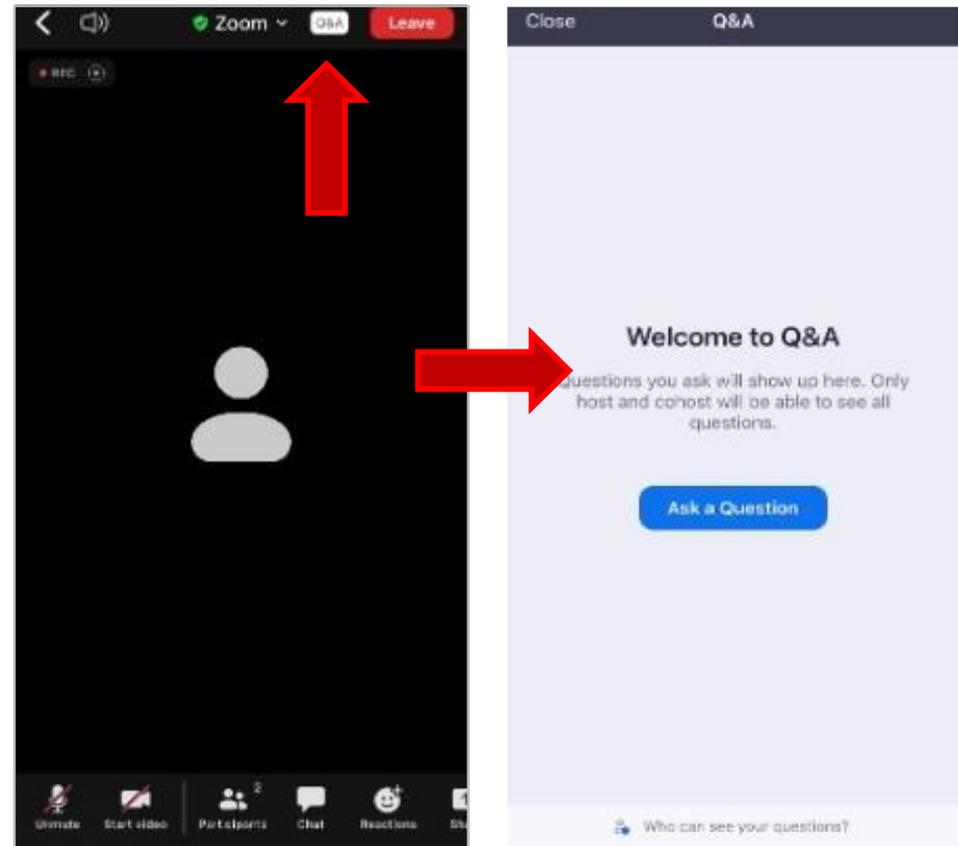


To Ask Questions – Use the Q&A Function

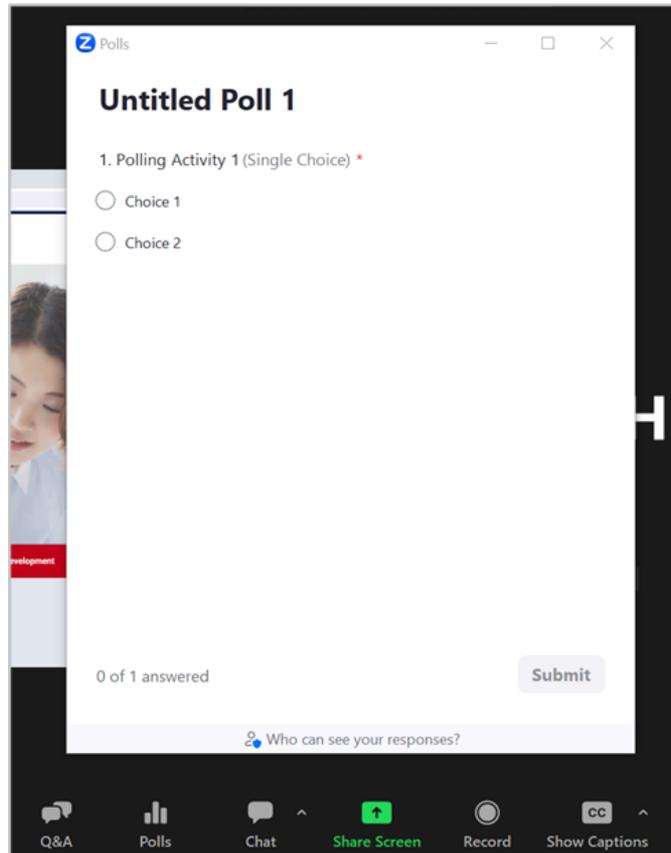
Computer



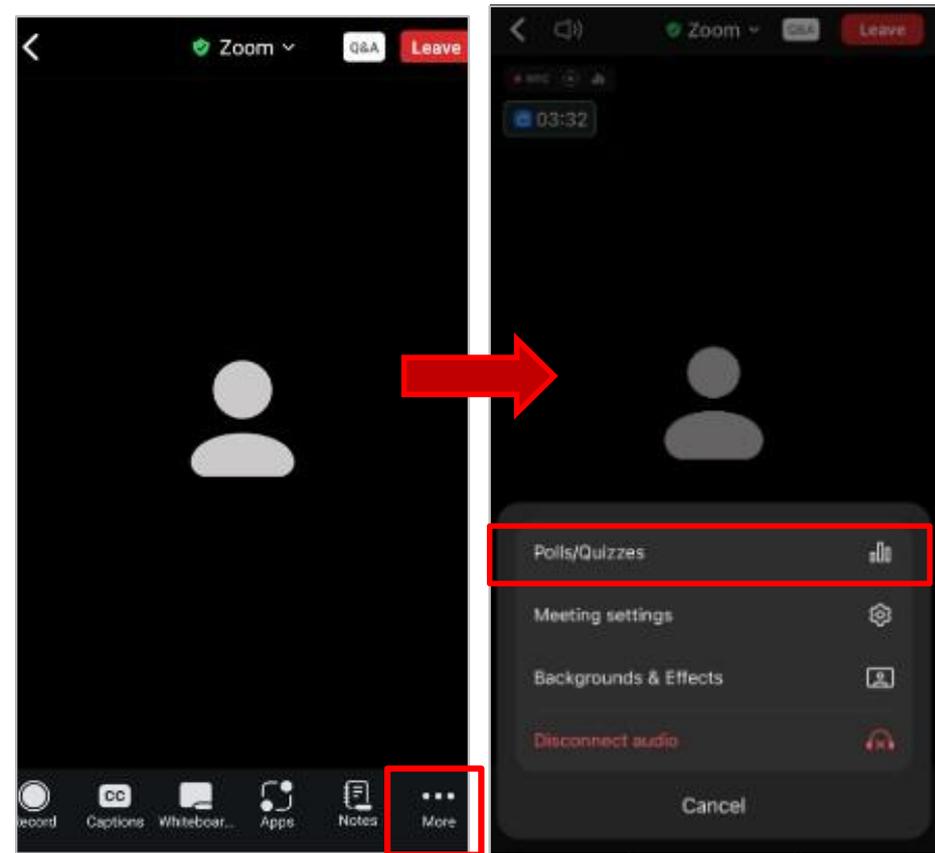
Mobile/Tablet



Polling function on a computer



Polling function on a mobile/tablet



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)



A screenshot of the "CPT Activity" search interface. The page title is "RECORD" and the sub-header is "CPT Activity". Below the sub-header, a note states "(Only activity records from 1 January 2015 are shown.)". The search area includes a "From" date field (empty) and a "To" date field containing "17-06-2024". Both date fields have calendar icons. At the bottom right, there are two red buttons: "RESET" and "SEARCH".

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

Support

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

- E-mail: education@hksi.org

