The background of the slide is a low-angle, upward-looking photograph of a modern skyscraper with a glass facade. The sun is shining brightly in the upper left corner, creating a lens flare effect. The sky is blue with scattered white clouds. The building's glass panels reflect the sky and the sun, creating a pattern of light and dark blue.

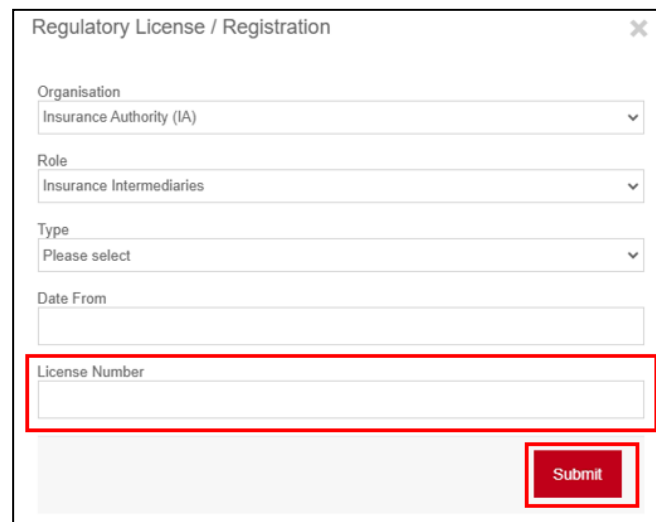
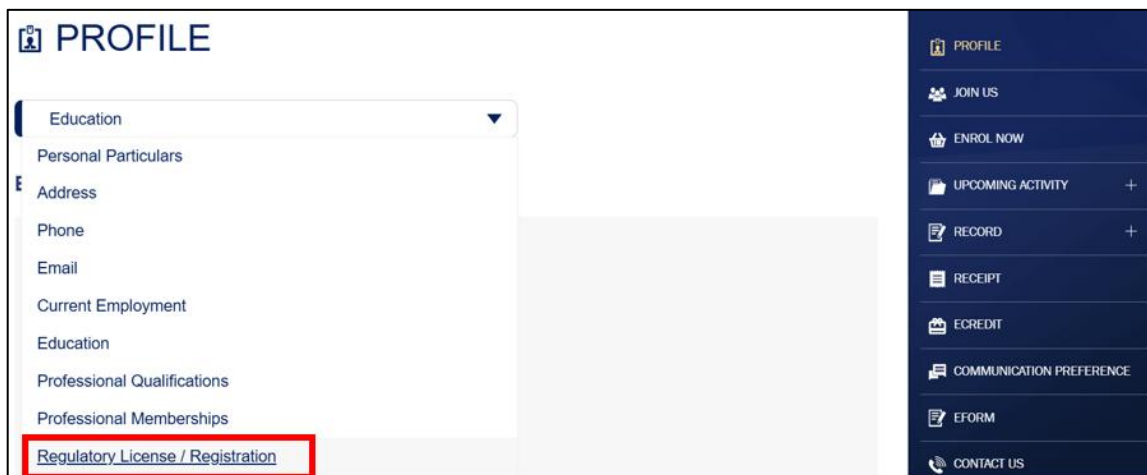
User Guide

[Webinar] Course for Insurance Brokers on Grandfathered ILAS Policies

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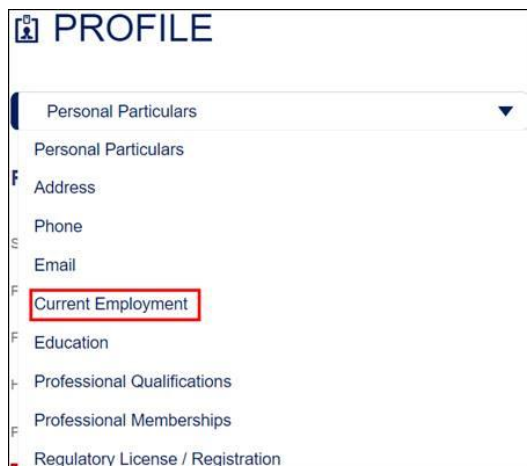
- This is the Course for Insurance Brokers on Grandfathered ILAS Policies.
- This course is recognised by the IA under the Grandfathering Arrangements and equips licensed insurance brokers with the necessary technical knowledge to continue providing advisory investment services or discretionary investment 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.

- 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.



Account Creation (con't)

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



The screenshot shows a web interface with a header 'PROFILE' and a dropdown menu. The menu items 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 a form titled 'Current Employment'. It has a red 'SAVE' button at the top. Below the button, there are three input fields: 'Company Name (English)' with the value 'HKSI', 'Hong Kong Securities and Investment Institute (香港證券及投資學會) (HKSI Institute)', and 'Date From'.

- Go to the dedicated course page.
- Click “**Add to Cart**”. (Below is an example only.)

Administrative Details	
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

[< Back](#) [Add to Cart](#)

- Login to the Online Portal and checkout within 15 minutes

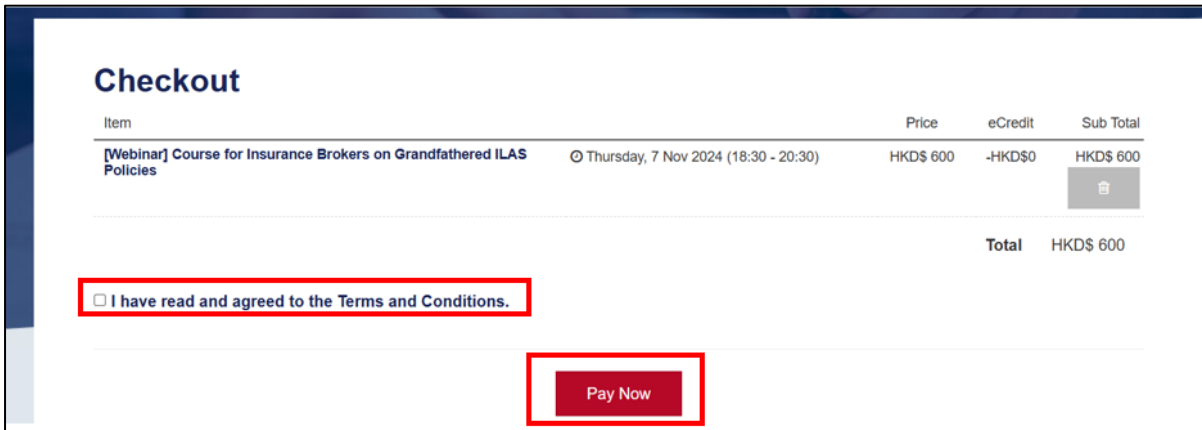


[Webinar] Course for Insurance Brokers on Grandfathered ILAS Policies


The above item is successfully added to the cart. Please checkout within 15 minutes.

[Checkout](#) [Select More](#)

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



The screenshot shows the 'Checkout' page of the HKSI website. It features a table with course details and a 'Pay Now' button. A red box highlights the checkbox for 'I have read and agreed to the Terms and Conditions.', and another red box highlights the 'Pay Now' button.

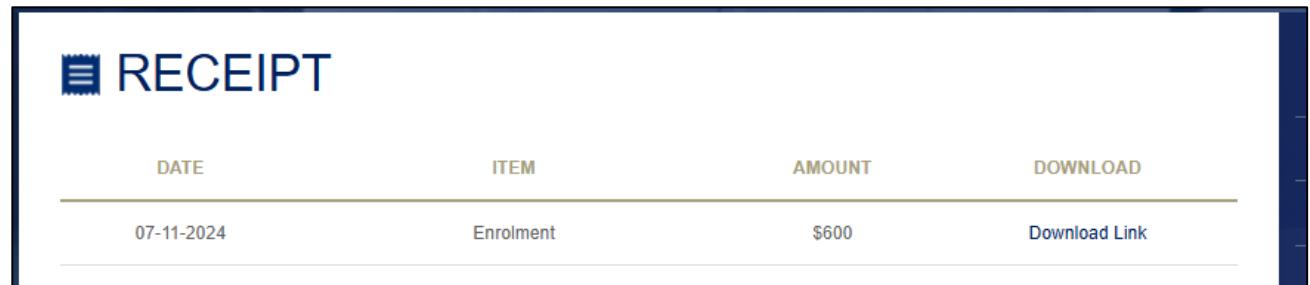
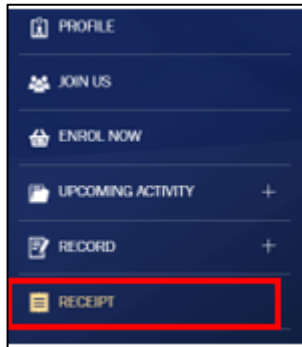
Item	Price	eCredit	Sub Total
[Webinar] Course for Insurance Brokers on Grandfathered ILAS Policies	HKD\$ 600	-HKD\$0	HKD\$ 600
			
Total			HKD\$ 600

☐ I have read and agreed to the Terms and Conditions.

Pay Now

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

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



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

- 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

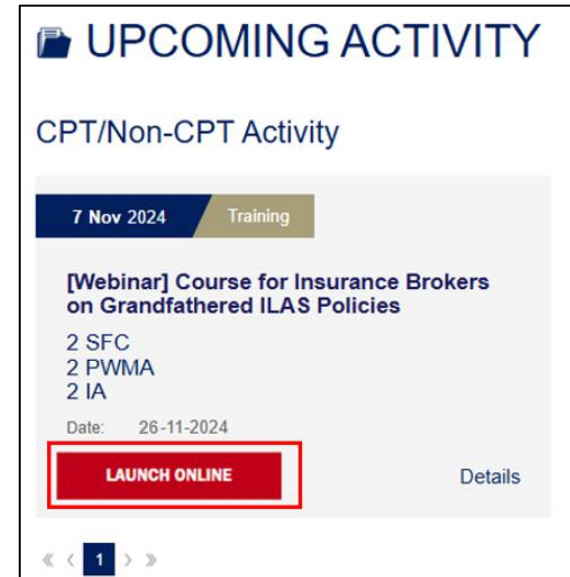
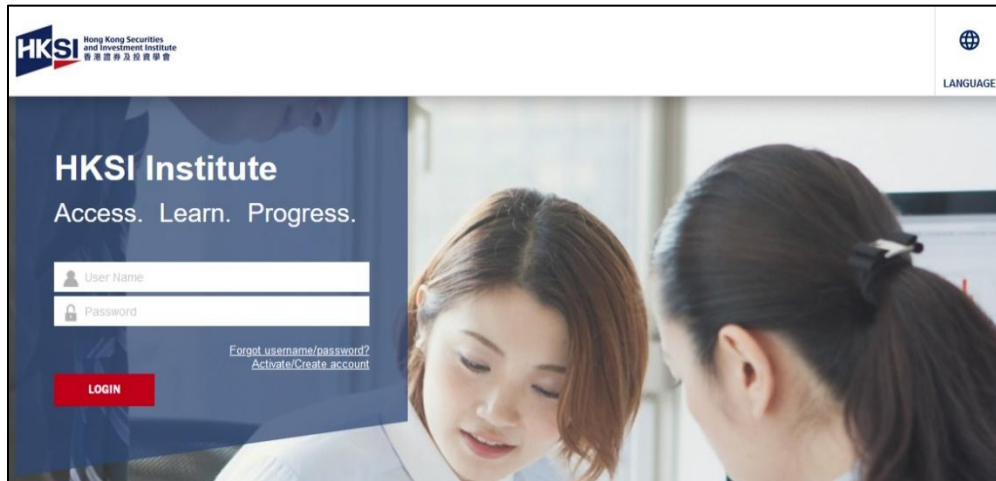


- To join the webinar, you are required to install the Zoom Meeting App (click [here](#) for installation instructions for computer and mobile device)
- If you are a first-time Zoom user, please download the app at least 20 minutes before the event to avoid delays.
- Click here to [test](#) if Zoom works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

Login via HKSI Institute Portal

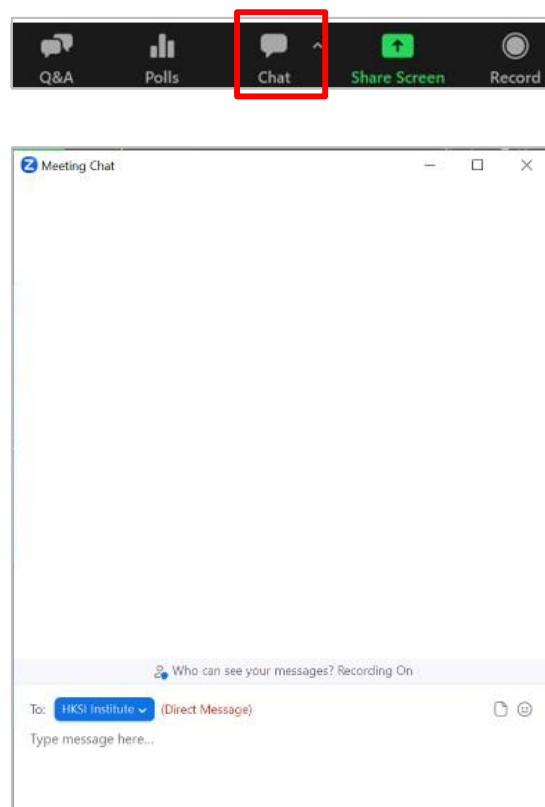


- On the event day, login to the HKSI Institute Online Portal: <https://login.hksi.org/login> by using your own username and password.
- Click on “**CPT/Non-CPT Activity**” under UPCOMING ACTIVITY tab.
- Click the “**Launch Online**” button which will appear **ONLY 30 minutes before** the session starts.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

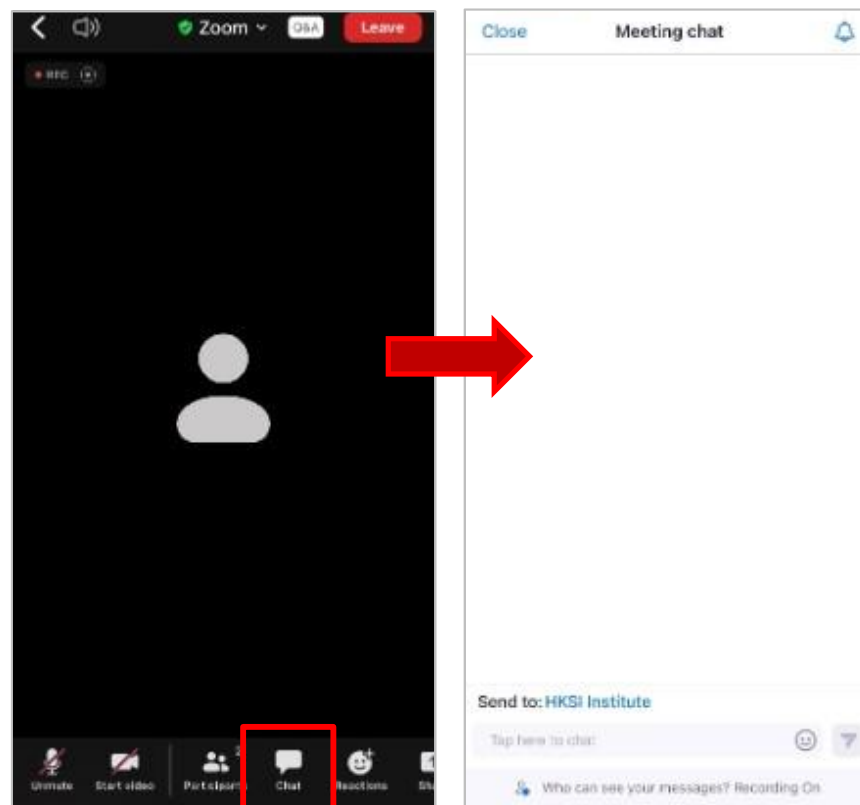


If You Need Assistance, Use the Chat Function

Computer

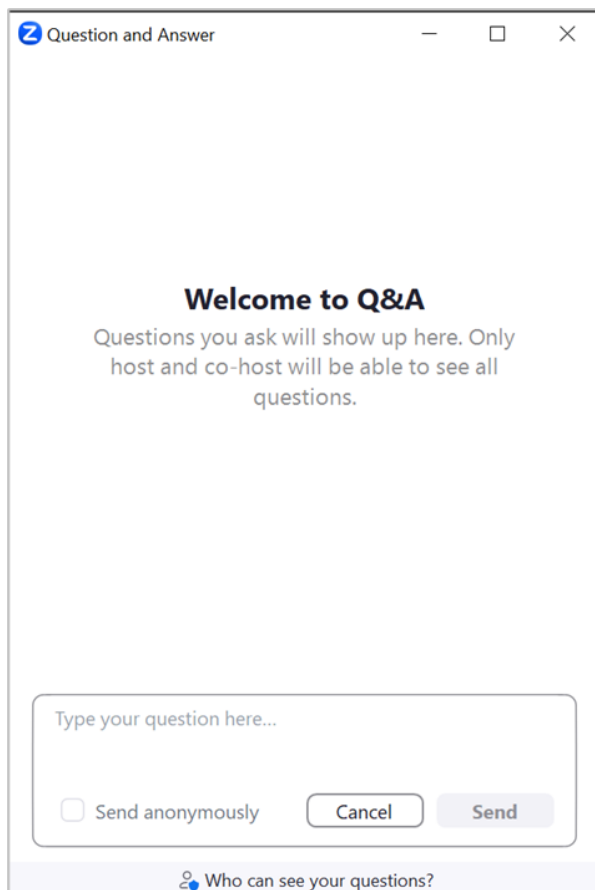


Mobile/Tablet

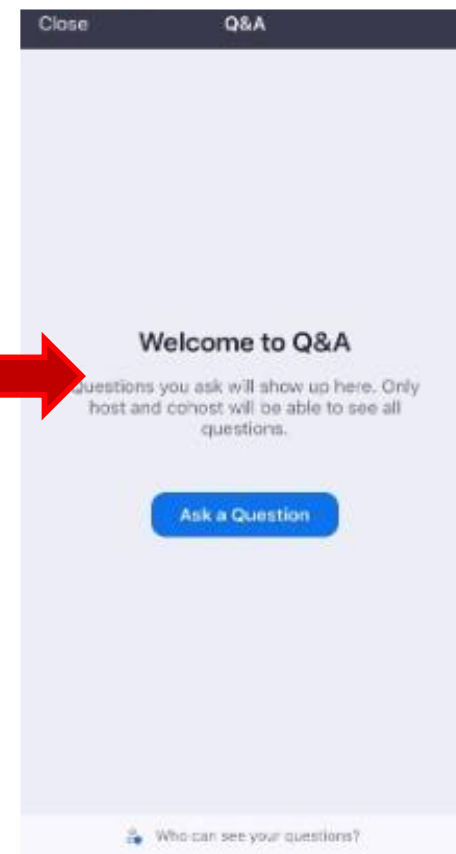
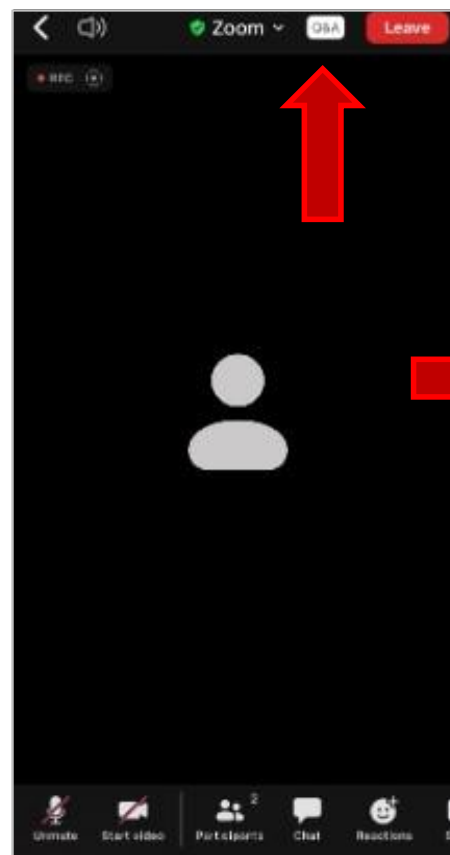


To Ask Questions – Use the Q&A Function

Computer

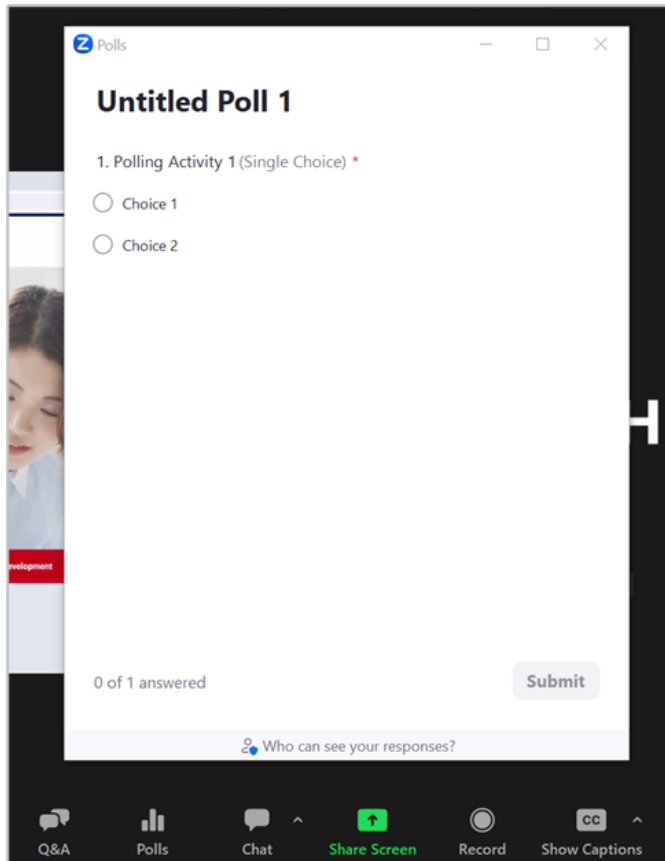


Mobile/Tablet

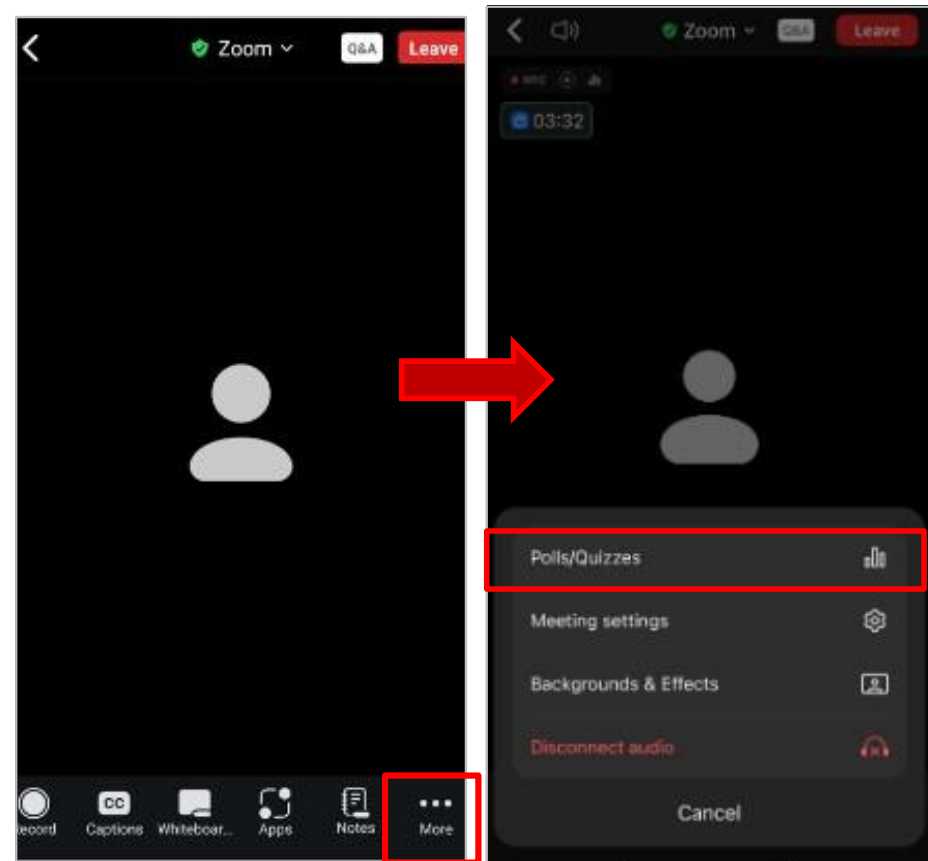


Polling Feature

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 a web interface for "CPT Activity". At the top, there is a blue header with a document icon and the word "RECORD". Below this, the title "CPT Activity" is displayed. A note in parentheses states: "(Only activity records from 1 January 2015 are shown.)". Below the note, there is a search form with two date pickers. The "From" date is empty, and the "To" date is set to "17-06-2024". At the bottom right of the form, 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

