Candidates are recommended to study the 2014 Edition of the Study Notes for examinations to be held before 6 November 2017.

Insurance Intermediaries Qualifying Examination
Syllabus for Travel Insurance Agents Examination

Part I  Principles and Practice of Insurance

I.  Risk and Insurance
   i.  Concept of Risk
       A.  Meaning of Risk
       B.  Classification of Risk
       C.  Risk Management
   ii. Functions and Benefits of Insurance

II.  Legal Principles
   i.  The Law of Contract
       A.  Definition
   ii.  The Law of Agency
       A.  Definition
       B.  How Agency Arises
       C.  Authority of Agents
       D.  Duties Owed by Agent to Principal
       E.  Duties Owed by Principal to Agent
       F.  Termination of Agency

III. Principles of Insurance
   i.  Insurable Interest
   ii.  Utmost Good Faith
   iii. Proximate Cause
   iv.  Indemnity
   v.  Contribution
   vi  Subrogation
IV. Structure of Hong Kong Insurance Industry
   i. Types of Insurance Business
   ii. Size of Industry
   iii. Insurance Intermediaries
   iv. The Hong Kong Federation of Insurers

V. Regulatory Framework of Insurance Industry
   i. Regulation of Insurance Companies in Hong Kong
      A. Insurance Companies Ordinance
      B. Code of Conduct for Insurers
      C. Guidelines on Complaint Handling
      D. Insurance Claims Complaints Bureau
   ii. Regulation of Insurance Intermediaries in Hong Kong
      A. Roles and Responsibilities of Insurance Agents and Brokers
      B. The Code of Practice for the Administration of Insurance Agents

VI. Ethical and Other Related Issues
   i. Insurance Intermediaries' Duties to Policyholders
   ii. Protection of Personal Data
   iii. Issues Regarding Equal Opportunity
   iv. Prevention of Corruption
   v. Prevention of Insurance Fraud
Part II Travel Insurance

I. Introduction
II. Travel Insurance Agents
III. Basic Features of Travel Insurance
IV. Documentation
V. Insured Trip
VI. Rating and Underwriting
VII. Personal Accident Benefits
VIII. Medical Expenses
IX. Hospital Benefit
X. Emergency Services
XI. Baggage and Personal Effects
XII. Baggage Delay
XIII. Personal Money
XIV. Loss of Travel Documents
XV. Personal Liability
XVI. Travel Delay
XVII. Loss of Deposit or Cancellation of Trip
XVIII. Curtailment of Trip
XIX. Outbound Travel Alert
XX. Limitations and Exclusions
XXI. Claims
XXII. Beneficiaries
XXIII. Miscellaneous General Provisions
XXIV. Handling of Contingencies

*******************