



Professional Diploma in Insurance (PDI)

Application Procedures

1. Applications must be submitted either by post or by hand to the General Office of the Institute of Professional Education And Knowledge (PEAK), Vocational Training Council within the application period.
Address: 9/F, VTC Tower, 27 Wood Road, Wanchai, Hong Kong
Operation hours: 8:45 a.m. - 8:00 p.m. (Monday to Friday) 9:00 a.m. - 12:00 noon (Saturday)
2. All application documents should be put in an envelope on which marked "Application for PDI".
3. Incomplete application materials will affect the process of admission to the programme.
4. Successful applicants will be required to present their original copies of credentials for verification at the time of registration.
5. Places will be offered to qualified applicants on a first-come-first-served basis. Early application is encouraged.
6. **PAYMENT METHOD:**
 - Please return the form by mail or in person with a crossed cheque payable to "Vocational Training Council" OR
 - Please return the form by fax / by mail / in person if you pay the course fee by credit card (VISA / MASTER)**Note:** for a course commencing within 7 working days at the time of enrollment, trainees are required to settle the course fee by cash at above address.
7. **DEADLINE FOR APPLICATION:** 7 Business days prior to commencement date of each module.
8. **Venue:** PEAK, VTC Tower, 27 Wood Road, Wanchai, Hong Kong

March 2024 Timetable: Part-time Evening

Course Code	Module	Dates & Time	Date of Examination Time: 18:45 – 21:45 (except otherwise specified modules)
792I2	Insurance Underwriting and Claims	Feb 26 Mar 04, 11, 18, 25 Apr 08, 15, 22, 29 May 06 (Every Mon, 18:45 - 21:45)	20-May-2024
795I2	Motor Insurance	Mar 04, 11, 18, 25 Apr 08, 15, 22, 29 May 06, 13 (Every Mon, 18:45 - 21:45)	27-May-2024 (Time: 18:45 – 22:00 including reading time from 18:45 – 19:00)
799I2	Legal Framework for Insurance Contract	Feb 27 Mar 05, 12, 19, 26 Apr 02, 09, 16, 23, 30 (Every Tue, 18:45 - 21:45)	14-May-2024
780I2	Insurance Organization Operations	Feb 28 Mar 06, 13, 20, 27 Apr 03, 10, 17, 24 May 08 (Every Wed, 18:45 - 21:45)	22-May-2024
797I2	Life Insurance Underwriting and Claims	Mar 06, 13, 20, 27 Apr 03, 10, 17, 24 May 08, 22 (Every Wed, 18:45 - 21:45)	5-Jun-2024
791I2	Insurance Principle and Practice	Mar 07, 14, 21, 28 Apr 11, 18, 25 May 02, 09, 16 (Every Thur, 18:45 - 21:45)	30-May-2024
782I2	Marine and Aviation Insurance	Mar 01, 08, 15, 22 Apr 12, 19, 26 May 03, 10, 17 (Every Fri, 18:45 - 21:45)	31-May-2024

Students completing 4 PDI modules including one ANZIIF legal module# are eligible for ANZIIF Associate Membership and graduates are eligible to apply for ANZIIF Senior Associate Membership.

^ Pre-requisite requirement for students taking the module of 797I2 Life Insurance Underwriting and Claims: at least a passing grade of module 796I2 Life & Health Insurance or equivalent; OR students can demonstrate sufficient knowledge and skills to complete the module successfully, say preferably possessing a minimum of 2 years' relevant work experience in life and health claims or underwriting, etc., with approval of the Programme Leader.

◆ Course Fee HK\$4,120 per module

◆ Additional Information:

- Students should study the most up-to-date PDI-"Notes to student", "syllabus" and other information available on web www.peak.edu.hk/course/PDI.html , including Admission Requirement.
- There is no guarantee that the external academic or professional recognition that currently applied remains unchanged including the ANZIIF membership eligibility requirements and credits up to a maximum 120 CII credits for PDI graduates. Students should check the up-to-date details on relevant websites.
- Tentative proposed modules in next intake (Mar 2024): Insurance Organization Operations, Financial Planning, Insurance Principle and Practice, Property Insurance, Motor Insurance, Life Insurance Underwriting and Claims and Legal Framework for Insurance Contract.

ENQUIRIES:

Programme Director: Mr. Simon YIP (Tel: 2919 1402)

Programme Officer: Mr. Alex TSAI (Tel: 2836 1852)

Programme Secretary: Mr. Alfred CHU (Tel: 2919 1545)

Hotline: 2836 1922 Fax: 2891 5707 E-mail: chuxiayou@vtc.edu.hk


Website: www.peak.vtc.edu.hk



Application Procedures of Continuing Education Fund **New arrangement after April 2019**



- Please refer to the website of Continuing Education Fund (CEF) at <https://www.wfsfaa.gov.hk/cef/en/application/procedures.htm> for the details regarding the Eligibility and Reimbursement Procedures.
- This course has been included in the list of reimbursable courses under the Continuing Education Fund. The mother course “Professional Diploma in Insurance” of the modules is recognised under the Qualifications Framework (QF Level 4).
- For the modules commenced on or before 31 March 2022 (the 1st module should be commenced on or before the date), CEF claimants would be eligible for fee reimbursement upon their successful completion of any 4 modules selected from PDI (CEF Course Code: 33F11053A), with the fulfilment of both the minimum attendance requirement of 70% AND 50% or above of the overall mark for each of the 4 modules.
- For the modules commenced on or after 16 August 2022, CEF claimants would be eligible for fee reimbursement upon their successful completion of any one module selected from PDI with the following CEF course codes, with the fulfilment of both the minimum attendance requirement of 70% AND 50% or above of the overall mark for each module.

CEF course code (for the modules commenced after 16 August 2022)	CEF Course Title in English (for the modules commenced after 16 August 2022)	
33Z139239	Insurance Organization Operations (Module from Professional Diploma in Insurance)	
33Z139247	Liability Insurance (Module from Professional Diploma in Insurance)	
33Z139255	Marine and Aviation Insurance (Module from Professional Diploma in Insurance)	
33Z139263	Personal Investment and Financial Services (Module from Professional Diploma in Insurance)	
33Z139271	Financial Planning (Module from Professional Diploma in Insurance)	
33Z13928A	Business Financial Planning (Module from Professional Diploma in Insurance)	
33Z139298	Insurance Principle and Practice (Module from Professional Diploma in Insurance)	
33Z139301	Insurance Underwriting and Claims (Module from Professional Diploma in Insurance)	
33Z13931A	Legal Aspect of General Insurance (Module from Professional Diploma in Insurance)	
33Z139328	Property Insurance (Module from Professional Diploma in Insurance)	
33Z139336	Motor Insurance (Module from Professional Diploma in Insurance)	
33Z139344	Life and Health Insurance (Module from Professional Diploma in Insurance)	
33Z139352	Life Insurance Underwriting and Claims (Module from Professional Diploma in Insurance)	
33Z139360	Legal Aspect of Life Insurance (Module from Professional Diploma in Insurance)	
33Z139379	Legal Framework for Insurance Contract (Module from Professional Diploma in Insurance)	

- **For CEF reimbursement, the following documents should be attached together with the application form* to PEAK for chopping stamp:**
 - **the tuition fees receipt**
 - **the attendance certificate – minimum 70% attendance record**
 - **the notification of examination result – at least passing marks of 50% as required by OCEF**
 - **letter of completion of 4 PDI modules (for modules commenced on or before 31 March 2022)**

****The application must be submitted to the Office of CEF within ONE year upon the successful completion of the course.***

Refund Policies for CEF applicants: Please note that once refund, student will not be allowed to sit for the examination.

1. In case of closure of the course provider prior to the commencement of the Course, the course provider shall refund to the course participants in full all course fees and other monies then paid by the CEF participants immediately.
2. If a course cannot be operated according to the specifications and descriptions originally published and made known to the CEF participants or otherwise the course specifications and descriptions as specified in the application then submitted by the course provider in applying for registration and that the CEF participants decline to accept the revised arrangements, the course provider shall refund to the CEF participants in full or on a pro-rata basis the course fees and other monies then paid by the CEF participants within one month after the CEF applicants have requested for course fees refund.
3. If a course cannot be operated on the date or at the time specified in the course leaflet or brochure and CEF participants decline the revised arrangements, the course provider shall refund in full or on a pro-rata basis the course fees collected to CEF participants within one month after the CEF participants have requested for course fees refund.
4. In case of cessation of a course after its commencement, the course provider shall refund the CEF participants the course fees and other monies then paid by the CEF participants on a pro-rata basis within one month after the cessation of the course.