

## “Work and Learn Programme” – Insurance Industry 保險業 – 「進修實習計劃」

### PROGRAMME INFORMATION 計劃詳情

#### Programme Mode 計劃模式

1. Under “Work and Learn Programme” – Insurance Industry (“WLP”), a successful applicant (“Student-worker”) will be offered a job placement of middle or back office at a participating company (“Employer”, i.e. an insurance company or professional intermediary company) for 16-month (“the period”). During the period, a Student-worker will generally work four days in the participating company and attend classes at Vocational Training Council (“VTC”) one day a week.

在保險業 – 「進修實習計劃」(“計劃”)下，成功的申請人(“學員”)可獲安排在參與機構(“僱主”，包括保險公司或專業中介公司)的中台及後勤部門接受為期16個月(“實習期”)的在職實習。實習期間，學員每週在公司4天工作，1天在職業訓練局上課。

#### Programme Intake and Quota 計劃招生及學員名額

2. Our targets are to conduct WLP and to invite application three times a year, i.e. every March, July and November, throughout 2016/17 to 2018/19, to recruit around 15 Student-workers per intake. Any adjustments to the quota will be separately announced.

我們計劃於2016/17至2018/19年間，每年招生三次，即三月、七月及十一月，每次招收約15名學員。若名額有所調整將會另行公告。

#### Eligible Applicants 合資格申請人

##### General Applicants 一般申請人

3. A general applicant shall make this application only if he/she is a resident of the Hong Kong Special Administrative Region and lawfully employable in Hong Kong, and attained the following academic qualifications and/or work experience:

一般申請人必須為香港特別行政區居民及可在香港合法受僱；一般申請人亦必須持有以下學歷及工作經驗：

- Bachelor Degree holder, or  
持有學士學位，或
- Higher Diploma holder with more than one year work experience, provided that experienced candidates with insurance background who do not meet the academic requirements, i.e. being a degree holder or a higher diploma holder will also be considered on a case by case basis.  
持有高級文憑並具有一年以上工作經驗，僱主或會個別考慮學歷未達到上述要求的申請人，即未持有學士學位或高級文憑學歷，惟相關申請人必須具備保險方面的工作經驗；

#### Company Referral Applicants 公司轉介申請人

4. WLP also accepts application of existing practitioners in the insurance industry referred by his/her employers, and application form for student-workers and companies should be submitted together by the employer, provided that:

計劃亦接受現職保險業員工的公司轉介申請，而僱主應同時提交學員及公司申請表格，惟必須符合以下條件：

- Company referral applicant fulfilled the academic requirements of WLP listed in paragraph 3 above; and  
公司轉介申請人須符合上述第3段所列的學歷要求；及
- Company referral applicant served the current company for not more than two years; and  
公司轉介申請人在其現職公司工作不超過兩年；及
- The current employer of the company referral applicant has also joined WLP as a participating company.  
公司轉介申請人現時的僱主必須同時為計劃的參與機構。

5. The approval of company referral applicants will take into account factors such as the number of applications in each intake and applicants' work experience and background, etc.

公司轉介申請人的審批將會因應每期招生的報名人數、其工作經驗及背景等因素作出考慮。

## **Selection Criteria 甄選準則**

6. Applicants are required to submit application form together with curriculum vitae, cover letter(s) and copies of all academic transcripts/employment references (applicable to general applicants), or current employment contract (applicable to company referral applicants) to VTC before the application deadline. Applicants may also be required to attend job interview(s) arranged by the Employer(s) (not applicable to company referral applicants) and/or academic admission interview(s) conducted by VTC. Employer may select an applicant based on their academic attainment, work experience (if applicable), as well as interview performance.

申請人須將申請表格，連同個人履歷、求職信及所有學歷副本／工作證明（適用於一般申請人）、或現職僱傭合約（適用於公司轉介申請人）的副本，於截止日期前交回職業訓練局。申請人或需出席由僱主安排的人職面試（不適用於公司轉介申請人）及／或由職業訓練局安排的人學面試。僱主將根據申請人的學歷成績、工作經驗（如適用）及面試表現，考慮是否聘請申請人。

## **Programme Structure : Work Component 計劃結構：工作實習方面**

7. The job placement is divided into two streams, namely the Young Insurance Executive (YIE) Stream and the Professional Brokerage Stream, to reflect its nature of work. The job placement information is available at [www.instalent.org.hk](http://www.instalent.org.hk). Applicants should read the job placement information carefully and indicate job preferences in the application form (not applicable to company referral applicants). Student-worker will be offered a job placement and will enter into an employment contract with at least 16-month duration with an Employer.

在職實習職位分為兩個分流：保險才雋分流及專業中介分流，以反映職位的工作性質。在職實習職位的資料可於[www.instalent.org.hk](http://www.instalent.org.hk)瀏覽，申請人應詳閱在職實習職位資料，並於申請表格內填寫欲申請的職位（不適用於公司轉介申請人）。學員須與僱主簽訂為期最少16個月的僱傭合約。

## **Programme Structure: Study Component 計劃結構：課堂方面**

8. A Student-worker will be enrolled into the Professional Diploma in Insurance (“PDI”) programme offering by Institute of Professional Education And Knowledge (“PEAK”) of VTC and shall attend classes one-day per week according to the schedule provided by VTC. Each student-worker is required to study 8 modules during the period (2 modules per trimester) and each module consists of 30

lecture hours. A student-worker should attain at least 70% attendance rate and pass in each module in order to award with a certificate of Professional Diploma in Insurance.

學員將入讀職業訓練局轄下的高峰進修學院所開辦的保險學專業文憑課程，並每週上課一天。在此課程下，學員須於實習期內修畢8個單元（每個學期修讀2個單元），每個單元包括30個授課小時。學員須於每個單元達到最少70%出席率、以及取得合格成績，方可獲頒發保險學專業文憑課程證書。

9. The modules under the PDI programme are as follows:

保險學專業文憑課程單元如下（只提供英文單元名稱）：

<b>Core Modules 核心單元</b>	
Insurance Organization Operations	
Insurance Principle and Practice*	
Insurance Underwriting and Claims	
<b>Elective Modules 選修單元</b> (Student-worker should choose Elective Modules based on Employer's preference) (學員應根據僱主意見選擇選修單元)	
<b><u>General Insurance Modules:</u></b>	<b><u>Life Insurance Modules:</u></b>
Property Insurance	Personal Investment and Financial Services (or Financial Planning)
Legal Aspect of General Insurance <sup>#</sup> (or Legal Framework for Insurance Contract <sup>#</sup> )	Life and Health Insurance
Liability Insurance	Life Insurance Underwriting and Claims
Marine and Aviation Insurance	Legal Aspect of Life Insurance <sup>#</sup> (or Legal Framework for Insurance Contract <sup>#</sup> )
Motor Insurance	Business Financial Planning

Remarks 備註：

The 8 modules should consist of one core module marked with \* and one legal module marked with #.

8 個單元中必須包括一個註有\*的核心單元及註有#的法律單元。

10. The PDI programme for November 2018 intake will commence on 2 November 2018. In the 1<sup>st</sup> trimester, student-worker will be required to study 2 modules (subject to change upon the final arrangement by PEAK) as follows:

2018年11月入學的保險學專業文憑課程將於2018年11月2日開課。學員須於第一

個學期修讀下列兩個單元（或會因應高峰進修學院的最終安排作出改動）：

	<b>Module Name</b> 單元名稱	<b>Class Schedule</b> 上課時間	<b>Date of Examination</b> 考試日期
<b>Two elective modules</b> 兩個選修單元	Motor Insurance  or 或  Business Financial Planning	Every Friday, 9:30am – 12:30pm (from 2 Nov 2018 to 11 Jan 2019).  逢星期五，上午9時30分至12時30分（2018年11月2日至2019年1月11日）	Motor Insurance: 28 January 2019 2019年1月28日  or 或  Business Financial Planning: 31 January 2019 2019年1月31日
	Legal Aspect of Life Insurance  or 或  Marine and Aviation Insurance	Every Friday, 2:00pm – 5:00pm (from 2 Nov 2018 to 11 Jan 2019)  逢星期五，下午2時至5時（2018年11月2日至2019年1月11日）	Legal Aspect of Life Insurance: 25 January 2019 2019年1月25日  or 或  Marine and Aviation Insurance: 1 February 2019 2019年2月1日

11. The PDI programme will be taught in English and supplemented with Cantonese where necessary; and assessment is in English, normally including a written assignment (30%) and a written examination (70%). Student-worker must obtain a minimum of 40% in both assignment and the examination for a pass in a module.

保險學專業文憑課程以英語授課，輔以廣東話講解。各單元之評估一般包括一份書面作業（30%）及一次考試（70%），須以英語作答。學員必須於兩者均取得最少 40% 分數，才可於該單元取得合格成績。

## **Remuneration and Allowance 薪酬及津貼**

12. During the initial 16-month employment<sup>1</sup>, a Student-worker will be entitled to the following remuneration/sponsorship from the Employer:

<sup>1</sup> Company referral applicant who successfully enrolled into WLP is not obligated to sign a new employment contract with the Employer. However, the Employer should add an addendum to the existing contract to fulfil terms and

在僱傭合約的首 16 個月期間<sup>1</sup>，學員將可獲僱主發放以下薪酬／贊助：

- Monthly remuneration of no less than \$10,000; and  
每月不少於\$10,000 薪酬；及
- PDI tuition fee sponsorship<sup>2</sup> by Employer (a total of 8 modules)  
僱主贊助保險學專業文憑課程學費<sup>2</sup>（共 8 個單元）

13. If a Student-worker fulfills all criteria below, he/she will also be entitled to a monthly Government allowance of \$2,500 (to be disbursed every four months during the initial 16-month employment):

如學員符合以下所有條件，更可於僱傭合約期內獲發每月\$2,500的政府津貼（在僱傭合約的首16個月期間每四個月發放一次）：

- Obtains 70% or above attendance rate in class at VTC or at the Employer's workplace every month; and  
每月在職業訓練局課堂及職場取得70%或以上出席率；及
- Passes in PDI modules; and  
於所修讀的保險學專業文憑課程單元取得合格成績；及
- Performs satisfactorily at workplace<sup>3</sup>.  
工作表現良好<sup>3</sup>。

14. For Student-worker who entered into an employment contract that exceeds 16-month period, upon completion of the initial 16-month employment, the Student-worker will be entitled to an annual remuneration of no less than \$150,000<sup>4</sup> starting from the 17<sup>th</sup> month of employment for one year. Should a Student-worker complete a 16-month employment contract and enter into a new employment contract to become a full-time employee of the Employer, the same adjustment on annual remuneration applies during the first year of the full-time employment.

與僱主簽訂超過 16 個月僱傭合約的學員，在完成首 16 個月的僱傭期後，其月入在第 17 個月起計的一年內，可獲每年不少於港幣 150,000 元<sup>4</sup>的薪酬。如學

---

conditions under WLP. Please refer to the "Application Form for Companies" for details.

成功的公司轉介申請人無需與僱主簽訂新僱傭合約，惟僱主須在現有合約中增訂條款，以符合計劃條款。詳情請參閱「機構參加表格」。

<sup>2</sup> The tuition fee per module is \$3,600, and to be increased to \$3,850 starting from March 2019. PDI tuition fee is not less than \$30,300 for 8 modules.

每個單元的學費為\$3,600，並將於 2019 年 3 月起增至\$3,850。保險學專業文憑課程 8 個單元學費合共不少於 \$30,300。

<sup>3</sup> Student-worker will be subject to a workplace performance assessment every 4 months.

學員須接受每四個月一次的工作表現評估。

<sup>4</sup> The remuneration comprises basic salary and other allowances such as meal allowance and transportation allowance.

酬金包括基本薪金和膳食津貼、交通津貼等其他津貼。

員完成 16 個月的僱傭期後與僱主簽訂新僱傭合約成為全職員工，上述有關年薪的要求於第一年的全職合約期內同樣適用。

## **Professional Qualification Obtained 專業資格及學歷**

15. A Student-worker who has successfully completed 8 modules and passed the relevant assessment of the PDI programme will be awarded with the Professional Diploma in Insurance, an academic qualification which is recognised under the Qualifications Framework at Level 4<sup>5</sup>.

成功完成8個保險學專業文憑課程單元及於所有單元取得合格成績的學員，將可獲頒發證書，學歷級別達到本港資歷架構第四級<sup>5</sup>。

16. Upon PDI programme completion, a Student-worker will also be eligible for application for the Australian and New Zealand Institute of Insurance and Finance (ANZIIF) Senior Associate Membership and be awarded up to a maximum of 120 credits for Chartered Insurance Institute (CII) insurance qualification.

取得保險學專業文憑學歷的學員，可獲澳大利亞及新西蘭保險與金融學會（ANZIIF）頒發高級會員資格，及英國特許保險學院（CII）保險學歷最多 120 學分。

## **Overseas Immersion Programme 海外進修機會**

17. To broaden Student-workers' horizon and to enable them to gain international perspective as well as understanding of the global insurance market, the Government will offer sponsorship for a maximum of 10 places per year from 2018/19 to 2019/20 to top performing Student-workers for a two-week intensive immersion programme in overseas insurance institutions. VTC would assess Student-workers based on their performance at workplace and at class.

為讓學員增廣見聞、擴闊視野及更了解環球保險市場，政府將在2018/19至2019/20年間，每年提供最多10個名額，資助計劃中最優秀的學員前赴海外保險機構，參與為期兩周的進修課程。職業訓練局將根據學員的工作及學業表現進行甄選。

---

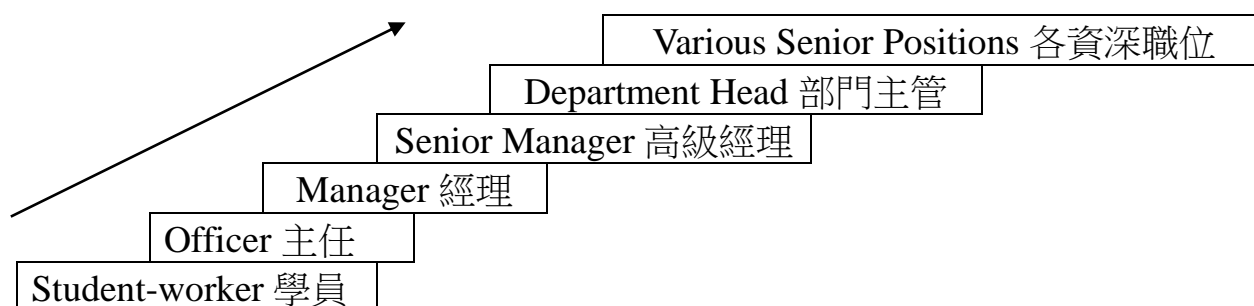
<sup>5</sup> The programme is recognised under the Qualifications Framework at Level 4. QR registration no.: 14/002698/L4. Validity period: From 1 April 2014 to 31 March 2022.

課程資歷已獲評定為達到資歷架構第 4 級。編號：14/002698/L4。有效期為 2014 年 4 月 1 日至 2022 年 3 月 31 日。

## Career Path in Insurance Industry 保險業發展階梯

18. At present, there are 160 authorised insurers, with 65% of the world's top 20 insurers conducting business in Hong Kong. Our insurance industry has experienced continued growth in the past five years, with an average annual growth of 14.8%. The total gross premiums of Hong Kong insurance industry amounting to HK\$132.5 billion in first quarter of 2018, offering a promising career and plenty of opportunities for career advancement. Student-worker may develop a career through the below pathway:

現時香港共有 160 間獲授權的保險公司，在全球 20 間頂尖保險公司中，便有 65% 在香港經營業務。香港保險業過去五年錄得 14.8% 的平均年增長率，2018 年首季的毛保費總額合共為 1,325 億港元，前景理想而且提供大量晉升機會。學員可循以下階梯發展事業：



## Application Method 申請方法

19. Please download the application form at [www.instalent.org.hk](http://www.instalent.org.hk). The completed application form together with supporting documents should be submitted to VTC by post or email no later than 5:00 pm, 14 September 2018:

請於 [www.instalent.org.hk](http://www.instalent.org.hk) 下載報名表格。填妥表格後連同所需文件於 2018 年 9 月 14 日下午 5 時或以前以郵寄或電郵方式交回職業訓練局：

Secretariat of the Pilot Programme to Enhance Talent Training for the Insurance Sector

9/F, VTC Tower, 27 Wood Road, Wanchai, Hong Kong

提升保險業人才培訓先導計劃秘書處

香港灣仔活道 27 號職業訓練局大樓 9 樓

Email 電郵：[instalent@vtc.edu.hk](mailto:instalent@vtc.edu.hk)



20. If a black rainstorm warning signal or tropical cyclone signal No. 8 or above is hoisted between 9:00 am and 12:00 noon on the above deadline, the deadline will be extended to 12:00 noon on the following working day, i.e. 17 September 2018.

如在上述截止申請日期當天的上午9時至中午12時期間，黑色暴雨警告信號或八號或以上熱帶氣旋警告信號生效，截止申請日期將會延至下一個工作天，即2018年9月17日的中午12時。

## **Enquiries 查詢**

21. Enquiries about WLP should be made to:  
有關計劃的查詢，請聯絡：

Secretariat of the Pilot Programme to Enhance Talent Training for the  
Insurance Sector

提升保險業人才培訓先導計劃秘書處

Tel 電話： 3974 3669

Email 電郵： [instalent@vtc.edu.hk](mailto:instalent@vtc.edu.hk)

Website 網址： [www.instalent.org.hk](http://www.instalent.org.hk)