



香港資優教育學院 The Hong Kong Academy for Gifted Education

Certificate in Banking and Financial Services

銀行及金融服務證書課程

(Date: 6 August - 12 September 2009)



香港銀行學會
The Hong Kong Institute of Bankers

Service Provider:

The Hong Kong Institute of Bankers

The “*Certificate in Banking and Financial Services*”, a 30 hours certificate program which consists of 7 sessions with final assessment at the end of the program, taught by market practitioner from banking and financial sectors. This programme has been conducted successfully in the past few years. It aims to equip the students with comprehensive knowledge of banking and investment services in the Hong Kong financial industries.

Programme Details

Objectives	Upon completion of the program, participants should be able to: <ul style="list-style-type: none">• Gain operational knowledge of customer services in banking industry• Develop industry specific skills and the confidence to face customers• Acquire the knowledge of basic banking products features and services• Understand the banking system and related compliance issues• Attain the skills and knowledge of ethical and effective selling
Topics	<ul style="list-style-type: none">• The Introduction of Hong Kong Banking System• General Banking Products Overview• Code of Practices in Banking and Financial Services• Financial Services Overview• Customer Services Overview in banking industry (Please see the Appendix for the details)
Course Date & Time	6 (Thu), 11(Tue), 13(Thu), 18(Tue), 22(Sat), 25(Tue), 27(Thu) August 2009 9:30am – 1:30pm ❖ <i>In case of cancellation of a lesson due to adverse weather conditions or outbreak of Swine Influenza A (H1N1), the cancelled lesson will be rescheduled on 5 September 2009 (Sat)</i>
Final Test Date & Time	12 September 2009 (Sat) 2:30pm – 4:30pm

Venue	HKIB Training Centre (3/F, Guangdong Investment Tower, 148 Connaught Road Central, Hong Kong – Sheung Wan MTR Station exit C)
Eligibility	Priority will be given to S3 or above student members in Humanities. Applications from other interested student members with confidence in completing the course will be put on the waiting list. If oversubscribe, applicants would be admitted to the course on a first come, first served basis.
Language	Cantonese supplemented with English course materials
Course requirement	<u>Certificate of Attainment</u> will be awarded to participants who are able to fulfill all the course requirements which include: ❖ achieving an attendance rate of not less than 80% AND ❖ with pass in the final test (passing mark is 60%)
Course fee	Free of charge
Application procedure & deadline	❖ Students should download the Application Form from the following website: http://hkage.org.hk/en/what_news.html ❖ Students should submit the completed Application Form to <i>The Hong Kong Academy for Gifted Education</i> by mail or by fax (<i>Fax number: 24904730</i>) on or before <u>26 July 2009 (Sun)</u> . Late application will not be considered.
Enrolment result	❖ The list of successful applicants will be posted on the following website: http://hkage.org.hk/en/what_news.html <u>after 5pm on 29 July 2009 (Wed)</u> . No further notification will be made. ❖ Successful applicants should download a “ Confirmation Slip ” from the website above. Completed Confirmation Slip should be faxed to the HKAGE <u>on or before 2 August 2009 (Sun)</u> .
Address of the HKAGE	The Hong Kong Academy for Gifted Education (Student Programmes and Services Division), East Block, Kowloon Tong Education Services Centre, 19 Suffolk Road, Kowloon Tong, Hong Kong
Enquiry	3698 3503 (Miss Chu)

**Training Schedule for
“Certificate in Banking and Financial Services”**

Date & Time	Topic
6 August 2009 (Thu) (9:30 – 13:30)	The Hong Kong Banking System <ul style="list-style-type: none"> - Banking system & structure - Relationship between bankers and customers
11 August 2009 (Tue) (9:30 – 13:30)	Banking Products Overview (Part I) <ul style="list-style-type: none"> - Types of accounts and account holders - Deposit products and clearing system - Credit card and electronic banking
13 August 2009 (Thu) (9:30 – 13:30)	Banking Products Overview (Part II) <ul style="list-style-type: none"> - Personal loan and mortgage products - Commercial banking products - Treasury products and services
18 August 2009 (Tue) (9:30 – 13:30)	Code of Practices in Banking and Financial Services <ul style="list-style-type: none"> - Prevention of money laundering - Know your customer - Personal data privacy - Bribery and corruption
22 August 2009 (Sat) (9:30 – 13:30)	Financial Services Overview (Part I) <ul style="list-style-type: none"> - Certificate of deposit - Personal Financial Management - Investment products and services
25 August 2009 (Tue) (9:30 – 13:30)	Financial Services Overview (Part II) <ul style="list-style-type: none"> - Insurance products - Mandatory Provident Fund - Equity Linked Instrument
27 August 2009 (Thu) (9:30 – 13:30)	Customer Services Overview in banking industry <ul style="list-style-type: none"> - Customer Relationship Building - Interpersonal and customer services skills - Ethical and effective selling - Sales and services cycle
12 September 2009 (Sat) (14:30 – 16:30)	Final Test