

財經事務培訓課程

Course Schedules for
Financial Services Training



BA (Hons) Accountancy (Reg. No. 251559)



Upgrade your Qualification, Brighten your Future!

Introduction

The BA (Hons) Accountancy is a degree programme offered by Coventry University and operated by PEAK. This carries the same academic status and recognition as that offered to Coventry University on-campus graduates.



Make it Happen for yourself!

Graduate's Voice

I have been working as an auditor for a couple of years. Though I have already completed my professional examinations and attained the recognised qualifications, the overall aspiration of higher academic level among the working populations has driven me to strengthen my competitiveness by studying for the Coventry University Bachelor of Arts (Hons) in Accountancy programme at PEAK. Apart from basic accounting knowledge, the programme also comprised content on the latest development in the field.

Lecturers from Coventry University and PEAK brought us a wide array on academic knowledge and global happenings. I would say this is an all-round programme.

Cheng Chi Yip, Graduate of BA (Hons) Accountancy

"Coventry is an evolving and innovative university"

Coventry University

Coventry University is a forward-looking University with a tradition as a provider of high quality education and a focus for multidisciplinary research. Coventry University has been established for over 150 years. In the recent teaching quality assessments conducted by the Quality Assurance Agency (QAA) of UK, the teaching in Coventry University is rated in the "excellent" range for a wide range of their provision. Currently around 12,000 full-time/sandwich students and 6,900 part-time students are studying for awards offered by the University.

Internationally Recognised Degree

The degree is awarded by Coventry University in United Kingdom, and is monitored and guaranteed by the Higher Education and Funding Council (HEFC) and the Quality Assurance Agency (QAA).

Student will be conferred the same award as on-campus's student.
<http://www.coventry.ac.uk>

Programme Features

▼ Fast Track – Final Year Honours Degree

The programme provides a direct entry to obtain a bachelor degree in one year on a part-time basis.

▼ Academically Sound and Highly Practical

Lectures are taught by university faculty and local field experts. Inspirations to students on cultural diversity brought by UK Professors and local lecturers' varied exposures in their industries will fill the class with up-to-date real-life cases that allow students to gain many practical insights.

Emphasis on both academic skills and work-related skills.



▼ Comprehensive Student Support

Comprehensive induction session and Add-vantage workshops. Students will be provided with access to PEAK's library and e-library which provide a comprehensive collection of up-to-date business and online learning resources; student can take part in anytime, anywhere learning.

▼ Flexible Programme Structure

This programme adopts a modular and flexible structure and such structure allows working students to retain their career advancement and earning power even during the study.

Programme Structure

283ACC	Research Methods	
281ACC	Decision Management	
381ACC	Performance Management	
380ACC	International Corporate Reporting	
383ACC	Accounting, Ethics & Society	
356FIN	Corporate Finance	
350FIN	Investment Analysis	
385ACC	Advanced Study for Accounting and Finance (Project)	

Admission Requirements

The entry requirements for this programme are:

- Professional Diploma in Accounting and Finance (PDAF) graduates or equivalent;
- A Higher Diploma / Associate Degree or a comparable qualification in a subject area related to the above from a university or recognised post-secondary institute in Hong Kong; *
- A qualification deemed to be equivalent to the above;*
- Proof of English proficiency equivalent to an HKCEE pass in English Language.

**Subject to final approval by Coventry University*

Enquiries

Christine Wan (2836 1853, cwan@vtc.edu.hk)

Professional Diploma in Accounting and Finance (PDAF) 會計及財務專業文憑課程

課程對象

本課程的對象為欲投身會計及金融行業人士報讀，亦適合行內人士作自我增值、考得學士學位及成為專業學會會員資格的最佳途徑。

課程結構

本文憑課程共八個單元

Course Code 編號	Module 單元	CEC Course Code 持續進修基金編號
301A2	Financial Accounting & Management Accounting 財務及管理會計	23Z05882-2
302A2	Hong Kong Business Law 香港商業法	21Z05884-3
303A2	Hong Kong Business Taxation 香港稅制	ⓐ23Z03549-0
310A2	Economics 經濟學	—
305A2	Advanced Financial Accounting 高級財務會計	—
306A2	Financial Management 工商財務管理	ⓐ23Z03549-0
307A2	Strategic Management 營商策略管理	21Z04887-2
308A2	Audit Practice and Legal Framework 審計實務及有關法例規章	ⓐ23Z03549-0
Elective Modules 選修單元		
304A2	Financial Mathematics and Management Information System 財務運算及管理資訊系統	—
309A2	Business Communication 商業傳意	21Z05904-1

ⓐ 學員需完成 303A2, 306A2 及 308A2 方符合持續進修基金發還款項申領資格

進修階梯



*學員如欲報讀會計學(榮譽)學士學位最後一年課程，必須在香港中學會考英國語文(課程乙)取得合格或以上成績，或具備同等學歷；但若學員未能提供其英語水平證明，則必須額外修讀 309A2 商業傳意單元。

課程顧問

陳家聰先生 BBA(Marketing), BSc(Financial Services), FCIB

陳家聰先生在金融業工作超過20年，自1981年起成為香港銀行學會會員，並在2003年獲選為資深會士。他在1996年加入職業訓練局，現時主要負責與商業及金融服務有關的專業文憑和學士課程。

課程編號	課程	日期及時間	學費	備註
301A2	財務及管理會計	日期: 20.8.10 - 29.10.10 (逢星期五) 時間: 6:45pm - 9:45pm 考試: 12.11.10	HK\$3,600	10年7月10日或之前報讀 今期課程可享受 九折優惠
302A2	香港商業法	日期: 16.8.10 - 18.10.10 (逢星期一) 時間: 6:45pm - 9:45pm 考試: 1.11.10	HK\$3,600	
303A2	香港稅務	請參閱下期課程手冊	HK\$3,600 ⓐ	
310A2	經濟學	請參閱下期課程手冊	HK\$3,600	
305A2	高級財務會計	日期: 17.8.10 - 19.10.10 (逢星期二) 時間: 6:45pm - 9:45pm 考試: 2.11.10	HK\$3,600	
306A2	工商財務管理	日期: 19.8.10 - 28.10.10 (逢星期四) 時間: 6:45pm - 9:45pm 考試: 11.11.10	HK\$3,600 ⓐ	
307A2	營商策略管理	請參閱下期課程手冊	HK\$3,600	
308A2	審計實務及有關法例規章	請參閱下期課程手冊	HK\$3,600 ⓐ	
304A2	財務運算及管理資訊系統	請參閱下期課程手冊	HK\$3,600	
309A2	商業傳意	日期: 18.8.10 - 27.10.10 (8.9.10 及 22.9.10 除外) (逢星期三) 及 11.9.10 (星期六) 時間: 6:45pm - 9:45pm (逢星期三) 及 2:15pm - 5:15pm (星期六) 考試: 10.11.10	HK\$3,600	

ⓐ 學員需完成 303A2, 306A2 及 308A2 方符合持續進修基金發還款項申領資格

查詢或報名

鄭先生 (2836 1744, jimmychang@vtc.edu.hk) 或 陳小姐 (2836 1855, fchan@vtc.edu.hk)

Professional Diploma in Financial Investment (PDFI) 金融投資專業文憑課程

課程對象

本課程為欲投身金融行業或行內欲進修之人士，提供一個具彈性的兼讀進修途徑。課程部份單元涵蓋證券及期貨從業員資格考試內容，有助學員預備資格考試之卷一、七及八。

課程結構

本文憑課程共八個單元

Course Code 編號	Module 單元	CEP Course Code 持續進修基金編號
425F2	Management Theory and Practice 管理學理論與實踐	◎21Z04688-8
426F2	Business Organisation 商業組織	
427F2	Economics 經濟學	
428F2	General Statistics and Data Analysis 統計及數據分析	-
429F2	Financial Accounting & Management Accounting 財務及管理會計	23Z05882-2
430F2	Regulatory Framework of Financial Markets 金融市場監管架構	-
431F2	Financial Instruments and Markets 金融產品及市場	23Z07592-1
432F2	Investment Concepts and Techniques 投資概念與技巧	-
Elective Module 選修單元		
433F2	Business Communication◎ 商業傳意	21Z05904-1

◎學員需完成 425F2 及 426F2 方符合持續進修基金發還款項申領資格

◎學員如未能提供其英語水平的證明，但欲報讀工商管理(榮譽)學士學位最後一年課程，則必須額外修讀 433F2 單元。

進修階梯



*學員如欲報讀工商管理(榮譽)學士學位最後一年課程，必須在香港中學會考英國語文科(課程乙)取得合格或以上成績，或具備同等學歷。

課程顧問

陳家聰先生 BBA(Marketing), BSc(Financial Services), FCIB

陳家聰先生在金融業工作超過20年，自1981年起成為香港銀行學會會員，並在2003年獲選為資深會士。他在1996年加入職業訓練局，現時主要負責與商業及金融服務有關的專業文憑和學士課程。

課程編號	課程	日期及時間	學費	備註
425F2	管理學理論與實踐	請參閱下期課程手冊	HK\$3,600 ①	10年7月10日或之前報讀 今期課程可享受 九折優惠
426F2	商業組織	日期: 16.8.10 - 18.10.10 (逢星期一) 時間: 6:45pm - 9:45pm 考試: 1.11.10	HK\$3,600 ①	
427F2	經濟學	日期: 17.8.10 - 19.10.10 (逢星期二) 時間: 6:45pm - 9:45pm 考試: 2.11.10	HK\$3,600	
428F2	統計及數據分析	請參閱下期課程手冊	HK\$3,600	
429F2	財務及管理會計	日期: 19.8.10 - 28.10.10 (逢星期四) 時間: 6:45pm - 9:45pm 考試: 11.11.10	HK\$3,600	
430F2	金融市場監管架構	待定	HK\$3,600	
431F2	金融產品及市場	待定	HK\$3,600	
432F2	投資概念與技巧	日期: 17.8.10 - 19.10.10 (逢星期二) 時間: 6:45pm - 9:45pm 考試: 2.11.10	HK\$3,600	
433F2	商業傳意◎	日期: 18.8.10 - 27.10.10 (8.9.10 及 22.9.10 除外) (逢星期三) 及 11.9.10 (星期六) 時間: 6:45pm - 9:45pm (逢星期三) 及 2:15pm - 5:15pm (星期六) 考試: 10.11.10	HK\$3,600	

① 學員需完成 425F2 及 426F2 方符合持續進修基金發還款項申領資格

◎ 學員如未能提供其英語水平的證明，但欲報讀工商管理(榮譽)學士學位最後一年課程，則必須額外修讀 433F2 單元。

查詢或報名

鄭先生 (2836 1744, jimmychang@vtc.edu.hk) 或 陳小姐 (2836 1855, fchan@vtc.edu.hk)

Pathway to Advance Your Career in Insurance, Financial Planning & Risk Management

Professional Diploma in Insurance (www.peak.vtc.edu.hk/course/PDI.htm)

- Education for all in the field of life insurance, general insurance and financial planning
- Satisfies the annual CPD requirement for Insurance Intermediaries
- Graduates are entitled to 150 non-unit specific credits (ACII, 290 credits)
- Students who complete 5 PDI modules including one legal module are eligible to ANZIIF Associate Membership
- Graduates can articulate into the final year of Coventry University BABA Degree

Examination Revision Class

- Australian and New Zealand Institute of Insurance (ANZIIF) Diploma of Financial Services (General Insurance) - Revision Class (www.peak.vtc.edu.hk/course/DFS.htm)
- CII Examination Revision Class (www.peak.vtc.edu.hk/course/CII.htm)

Graduate Diploma of Financial Services (www.peak.vtc.edu.hk/course/GDFS.htm)

- Direct entry for Degree holders, ACII, FLMI, CFP & ANZIIF (Senior Associate) with 5 years of work experience
- Postgraduate qualification in General Insurance or Financial Planning stream
- Graduates may receive up to a maximum of 8 credit points of advanced standing in the Deakin MBA programme
- Offers the only direct pathway leading to ANZIIF Fellowship in Hong Kong

Master of Business Administration (www.peak.vtc.edu.hk/course/MBA.htm)

- Deakin University received a national award for Teaching Excellence and seven Citations for Outstanding Contributions to Student Learning
- Twiced named "University of the Year" by the Australian Good Universities Guide for innovative use of technology in education and partnerships with industry
- 5-star rating from Good Universities Guide, 5-star MBA rating from the Graduated Management Association of Australia Inc (GMAA)
- Top 10 ranking of Australia / New Zealand MBA
- 8 core units and 4 elective units which can be grouped into more than 20 areas of specialisation including insurance and financial planning
- Flexibility to opt for study local class or residential courses in Australia or other countries
- Provides advanced standing to qualified applications including GDFS graduates of up to 8 units; or up to 6 units for CPA Australia or CIMA professional qualifications

Master of Insurance and Risk Management (under the process of non-local course registration)

- Degree graduate may just take 8 units to obtain the ANZIIF Fellowship and Master
- Option of completing a specialisation in Insurance or Risk Management
- Opportunity to undertake elective business practicum unit that provides appropriate and relevant experiential learning in a business context

Diploma of Financial Services (General Insurance) (DFS)

Module Code 單元編號	Module Name 單元名稱	Fee 費用	Examination Date 考試日期
FSI506	Commercial Lines Underwriting Management 商業保險承保管理 Date: 23.8.10, 30.8.10, 6.9.10 Time: 6:30pm - 9:30pm Duration: 9 hours (total 3 sessions) Exam: 7.10.10	HK\$720	7.10.10 (SBP2)

Remarks: Students have to separately complete the ANZIIF examination enrollment form & communicate directly with ANZIIF as per the 2010 ANZIIF Course Handbook at <www.theinstitute.com.au> for full details.
The above local classes are independently run by PEAK with enrollment using the usual PEAK short course Application Form subject to deadline of 7 business days before class commencement.

Enquiries

Wayne Lee (Tel: 2836 1821) / Eddy Lau (Tel: 28361863)

Professional Diploma in Insurance (PDI)

Tentative Timetable subject to final confirmation

Module Code 單元編號	Module Name 單元名稱	Fee 費用	Examination Date 考試日期 (Time: 18:45 - 21:45)
79512	Motor Insurance Jul 19, 26 Aug 2, 9, 16, 23, 30 Sep 6, 13, 20 (Every Mon., 18:45 – 21:45)	HK\$3,300 	Oct 4, 2010
79412	Property Insurance Jul 20, 27 Aug 3, 10, 17, 24, 31 Sep 7, 14, 21 (Every Tue., 18:45 – 21:45)	HK\$3,300 	Oct 5, 2010
79912	Legal Framework for Insurance Contract # Jul 14, 21, 28 Aug 4, 11, 18, 25 Sep 1, 8, 15 (Every Wed., 18:30-21:30)	HK\$3,300 	Sep 29, 2010
78112	Liability Insurance Jul 21, 28 Aug 4, 11, 18, 25 Sep 1, 8, 15, 29 (Every Wed., 18:45-21:45)	HK\$3,300 	Oct 13, 2010
78212	Marine & Aviation Insurance Jul 15, 22, 29 Aug 5, 12, 19, 26 Sep 2, 9, 16 (Every Thu., 18:30-21:30)	HK\$3,300 	Sep 30, 2010
79112	Insurance Principle & Practice Jul 16, 23, 30 Aug 6, 13, 20, 27 Sep 3, 10, 17 (Every Fri., 18:30-21:30)	HK\$3,300 	Oct 8, 2010

- Evidence of passing the examination of at least one module in a particular year will satisfy the annual 10 CPD hours for insurance intermediary license renewal for 6 years at most.
- Student who has completed 5 PDI modules, including one legal module# is eligible to ANZIIF Associate Membership
- Graduates are entitled to 150 non-unit specific credits at Advanced Diploma level (ACII, 290 credits)
- CEF-reimbursable course (under the name of Advanced Certificate in Insurance)
- Students should study the most up-to-date PDI Programme Information, particularly the "Notes to student", "Exemption arrangement" and "Syllabus" available on web www.peak.vtc.edu.hk/course/PDI.htm

Programme Director

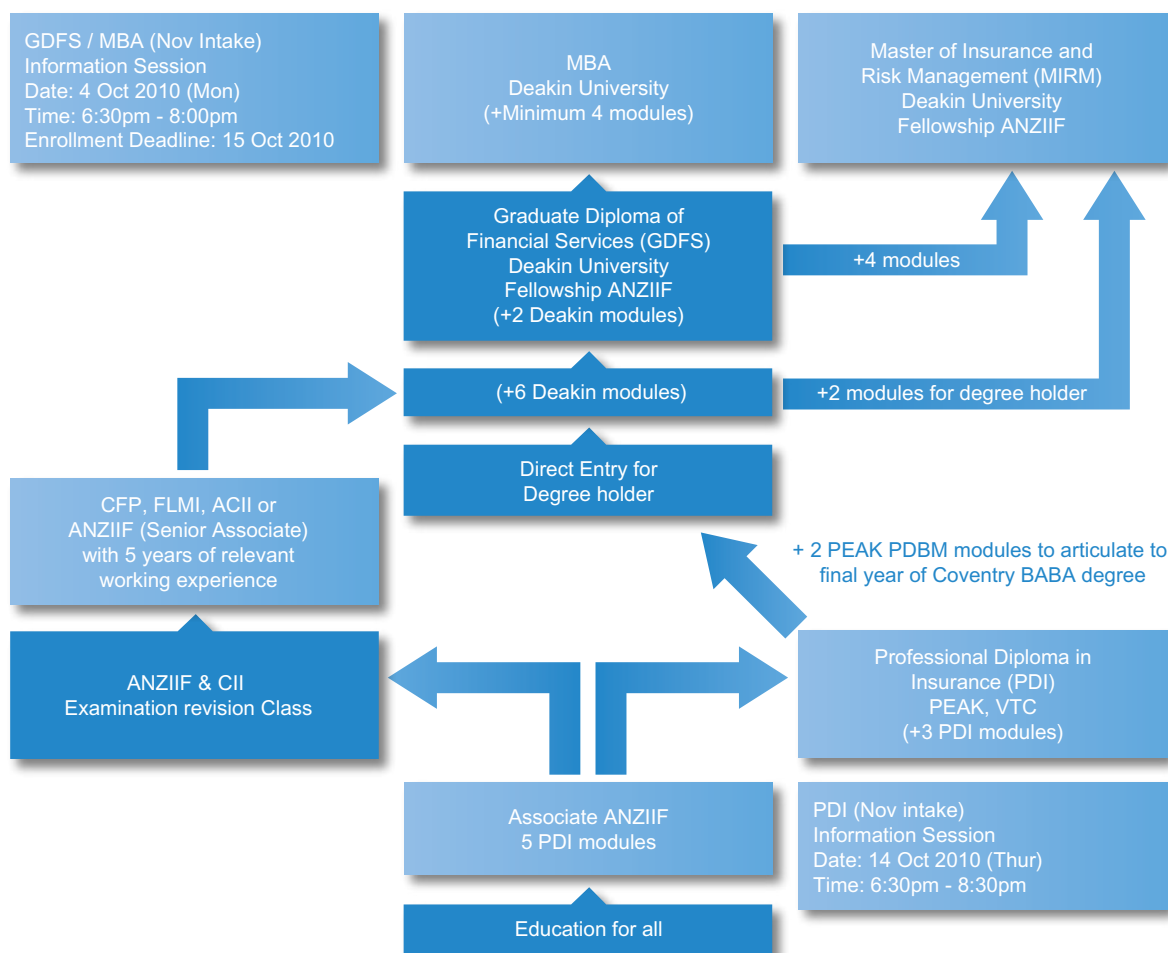
Eddy Lau LLM, MBA, GDI, MA, FCII, ANZIIF(Fellow), FCI Arb, ACILA

Eddy Lau graduated from Hong Kong Polytechnic in Professional Diploma in Business Studies - Insurance and has also obtained a L.L.M.(Chinese & Comparative Law) and a M.A. (Arbitration and Dispute Resolution) from City University; a L.L.M.(Civil and Commercial Law) from Renmin University of China. Before joining the Vocational Training Council as training consultant in 1994, he had spent over 10 years in the insurance industry, with experience in underwriting and claims in all classes of general insurances. In PEAK, VTC, he also develops, organises and delivers insurance units for the Deakin MBA course and Graduate Diploma of Financial Services. He is the author of a Chinese book "Hong Kong and Chinese Insurance Law" and has published various insurance articles in local and international magazines (in Chinese or English).

Enquiries

Miss Au (2836 1205)

Path from PDI to MBA, MIRM



Under the existing arrangement, completion of 6 PDI modules including one legal module and Marine & Aviation Insurance and 3 ANZIIF Senior Associate modules can enable students to obtain the international professional ANZIIF Senior Associate Membership and local academic qualification concurrently. ANZIIF Senior Associate may also directly apply to final year of BABA of Coventry University.

Admission to the mentioned courses may be entirely at the discretion of the respective institutions subject to their course rules.

Insurance Institute of Hong Kong 香港保險學會

Code 編號	Course Information 課程資料	Fee 學費	Remarks 備註
35312	保險原則及實務 Principles and Practice of Insurance 日期: 1.9.10 - 13.10.10 (逢星期三, 除 22.9.10) 時間: 6:30pm - 9:30pm	HK\$1,575	
35512	人身保險 Insurances of the Person 日期: 2.9.10 - 14.10.10 (逢星期四, 除 23.9.10) 時間: 6:30pm - 9:30pm	HK\$1,575	
35412	法律原則 Legal Principles 日期: 6.9.10 - 11.10.10 (逢星期一) 時間: 6:30pm - 9:30pm	HK\$1,765	
35212	保險初階 Introduction to Insurance 日期: 7.9.10 - 12.10.10 (逢星期二) 時間: 6:30pm - 9:30pm	HK\$1,575	