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COMPANY LIMITED  
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香港保險中介人商會年刊誌慶

匯聚菁英  
共建繁榮



PATRICK LEUNG AGENCY LTD  
GENERAL AGENT

專業保險團隊  
無時無刻，竭盡所能  
聆聽你的聲音、了解你的需要和解決你的疑難

**PATRICK LEUNG AGENCY LTD**  
**GENERAL AGENT OF TRANSAMERICA LIFE (BERMUDA) LTD**

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*We Serve Insurance Intermediaries Only.*  
我們專為中介人服務

## SAFEGUARDING PLANNING

醫療保險 企業保險  
個人理財 日常家居



HONG KONG CHAMBER OF INSURANCE INTERMEDIARIES  
STATEMENT OF PROFIT OR LOSS AND OTHER COMPREHENSIVE INCOME  
FOR THE YEAR ENDED 30 JUNE 2015

|  | Notes | 2015<br>HK\$     | 2014<br>HK\$     |
|--|-------|------------------|------------------|
| <b>INCOME</b>                                  |       |                  |                  |
| Advertising income                             | 5     | 179,700          | 161,300          |
| Bank interest income                           | 5     | 3,700            | 3,661            |
| Membership subscription and entrance fee       | 5     | 60,450           | 63,200           |
| Surpluses on Chamber's activities, net         | 5     | 35,753           | 33,119           |
| Sundry income                                  |       | 11,970           | –                |
|  |       | <u>291,573</u>   | <u>261,280</u>   |
| <b>Less: EXPENDITURE</b>                       |       |                  |                  |
| Accountancy fee                                |       | (3,800)          | (2,500)          |
| Administrative expenses                        |       | (130,760)        | (90,000)         |
| Assessment Fee                                 |       | (6,000)          | –                |
| Auditors' remuneration                         |       | (8,000)          | (6,500)          |
| Business registration fee                      |       | –                | (550)            |
| Community expenses                             |       | (4,900)          | –                |
| Donation                                       |       | (6,000)          | (6,000)          |
| Exam fee                                       |       | –                | (2,438)          |
| Insurance                                      |       | –                | (624)            |
| Printing and stationery                        |       | (3,809)          | (3,220)          |
| Souvenir expenses                              |       | (26,700)         | –                |
| Sundry expenses                                |       | (18,417)         | (27,767)         |
| Website  |       | (6,250)          | (1,800)          |
| Year book publication                          |       | (60,931)         | (52,920)         |
|  |       | <u>(275,567)</u> | <u>(194,319)</u> |
| <b>SURPLUS BEFORE TAX</b>                      | 6     | <b>16,006</b>    | <b>66,961</b>    |
| <b>INCOME TAX EXPENSE</b>                      | 8     | <b>5,803</b>     | <b>(776)</b>     |
| <b>SURPLUS FOR THE YEAR</b>                    |       | <b>21,809</b>    | <b>66,185</b>    |
| <b>OTHER COMPREHENSIVE INCOME</b>              |       | <b>–</b>         | <b>–</b>         |
| <b>TOTAL COMPREHENSIVE INCOME FOR THE YEAR</b> |       | <b>21,809</b>    | <b>66,185</b>    |

## HONG KONG CHAMBER OF INSURANCE INTERMEDIARIES STATEMENT OF FINANCIAL POSITION AS AT 30 JUNE 2015

|                               | Notes | 2015<br>HK\$    | 2014<br>HK\$    |
|-------------------------------|-------|-----------------|-----------------|
| <b>NON-CURRENT ASSETS</b>     |       |                 |                 |
| Property, plant and equipment | 9     | 1               | 1               |
| <b>CURRENT ASSETS</b>         |       |                 |                 |
| Accounts receivable           |       | 142,350         | 25,300          |
| Interest receivable           |       | 1,171           | 1,177           |
| Income tax recoverable        |       | 8,249           | 6,404           |
| Fixed deposit                 |       | 615,457         | 611,751         |
| Bank balances                 |       | 161,998         | 232,062         |
|                               |       | <u>929,225</u>  | <u>876,694</u>  |
| <b>CURRENT LIABILITIES</b>    |       |                 |                 |
| Accruals                      |       | (55,282)        | (9,560)         |
| Deferred income               |       | –               | (15,000)        |
|                               |       | <u>(55,282)</u> | <u>(24,560)</u> |
| <b>NET CURRENT ASSETS</b>     |       | <u>873,943</u>  | <u>852,134</u>  |
| <b>NET ASSETS</b>             |       | <u>873,944</u>  | <u>852,135</u>  |
| <b>GENERAL FUND</b>           |       |                 |                 |
| Accumulated surplus           |       | <u>873,944</u>  | <u>852,135</u>  |

The financial statements were approved and authorised for issue by the Executive Committee on 1 December 2015.



President: Lee Wai Kan Perry



Treasurer: Pun Hong Ning

### 香港保險業務統計數字

#### Statistics on Hong Kong Insurance Business

| 獲授權保險公司數目 Number of Authorized Insurers (31/12/2015) |            |
|--|------------|
| 一般業務 General   | 93         |
| 長期業務 Long Term                                       | 45         |
| 綜合業務 Composite                                       | 19         |
| <b>總數 Total</b>                                      | <b>157</b> |

| 保險中介人數目 Number of Insurance Intermediaries (31/12/2015)         |        |
|---|--------|
| <b>保險代理登記數目 Number of Registered Insurance Agents</b>           |        |
| 保險個人代理人 Individual Agents                                       | 53,816 |
| 保險代理商 Responsible Officers / Insurance Agencies                 | 2,493  |
| 負責人及業務代表 Technical Representatives                              | 27,756 |
| <b>保險經紀登記數目 Number of Registered Insurance Brokers</b>          |        |
| 獲授權保險經紀 Insurance Brokers                                       | 733    |
| 授權保險經紀的行政總裁 / 業務代表 Chief Executives / Technical Representatives | 9,397  |

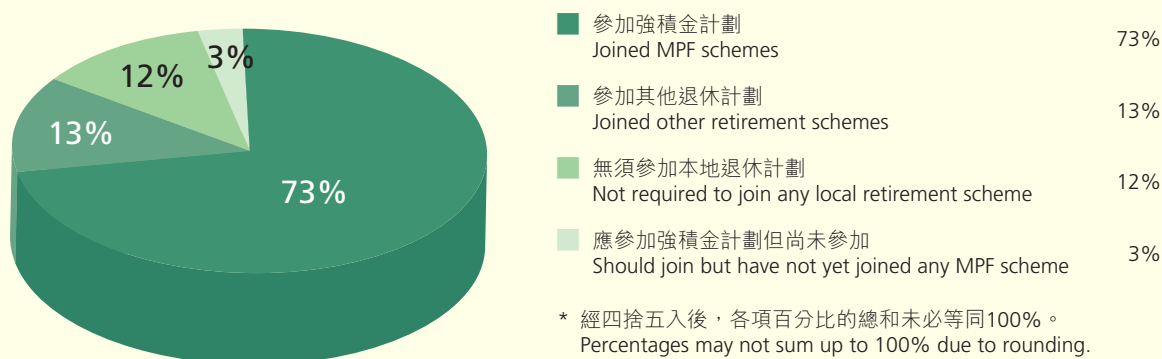
| 香港保險業務 Hong Kong Insurance Business  |                |
|--|----------------|
| 香港保險業務2015年臨時統計數字 Hong Kong Insurance Business 2015 Provisional Statistics | (In Million)   |
| 一般保險業務的毛保費 General Business Gross Premium                                  | 45,961         |
| 長期保險業務的毛保費 Long Term Business Gross Premium                                | 131,273        |
| <b>香港保險業的毛保費總額 Hong Kong Insurance Gross Premium</b>                       | <b>177,234</b> |

本報告是根據保險業監督資料編輯而成，只作參考，並不保證準確。更詳盡的統計數字資料可從保監處的互聯網站下載。  
This report is based on data compiled from the Insurance Authority. It is for reference only and does not guarantee accurate. More detailed information can be downloaded from the website of OCl.

### 就業人口

#### The Employed Population

2015年12月 (December 2015)



在就業人口中，有73%獲強積金計劃保障，13%受其他退休計劃保障，如公務員退休金計劃及獲強積金豁免的職業退休計劃等。12%就業人口並沒有法律責任參加任何本地退休計劃。他們大部分均為家務僱員及65歲以上或18歲以下的僱員。其餘3%的就業人口為應參加強積金計劃但尚未參加的人士。

Among the employed population, 73% are covered under MPF schemes and 13% are covered under other retirement schemes, such as Civil Service Pension Scheme, and MPF exempted ORSO schemes, etc. Twelve percent of the employed population, most of them domestic employees and employees who are aged above 65 or below 18, are not required to join any local retirement scheme according to law. The remaining 3% of the employed population are people who should have joined MPF schemes but have not done so.

### 強積金中介人

#### MPF Intermediaries

截至2015年12月31日，共有32833名註冊強積金中介人，當中主事中介人佔400名，附屬中介人佔32433名。

As at 31 December 2015, there were 32833 registered MPF intermediaries, comprising 400 principal intermediaries and 32433 subsidiary intermediaries.

資料來源Sources of Data: 強制性公積金計劃管理局Mandatory Provident Fund Schemes Authority

協力Supported By: 積金超市有限公司Mpfsupermart Company Limited

## 常見保險、投資或精算專業資格及認證

## LISTS OF INSURANCE, INVESTMENT OR ACTUARIAL QUALIFICATIONS & CERTIFICATIONS

| 專業機構 Professional Bodies   | 專業名銜 Professional Designation  |                     | 網址 Website   |
|--|--|---------------------|--|
| Chartered Insurance Institute<br>英國特許保險學院  | Associate 院士   | ACII                | <a href="http://www.cii.co.uk">http://www.cii.co.uk</a>  |
|  | Fellow 資深院士  | FCII                |  |
| Australian and New Zealand Institute of Insurance and Finance<br>澳大利亞及新西蘭保險與金融學會 | Senior Associate<br>資深準會員  | ANZIIIF (Snr Assoc) | <a href="https://www.theinstitute.com.au">https://www.theinstitute.com.au</a>  |
|  | Fellow 高級會員  | ANZIIIF (Fellow)    |  |
| Life Office Management Association<br>美國壽險管理學會                                   | Fellow 會士  | FLMI                | <a href="http://www.loma.org/">http://www.loma.org/</a><br><a href="http://www.loma.com.hk">http://www.loma.com.hk</a>             |
| The American College of Finance Services<br>美國學院                                 | Chartered Life Underwriter<br>特許壽險承保人                                  | CLU                 | <a href="http://www.theamericancollege.edu">http://www.theamericancollege.edu</a>  |
|  | Chartered Financial Consultant<br>美國特許財務顧問                             | ChFC                | <a href="http://www.theamericancollege.edu">http://www.theamericancollege.edu</a>  |
| Financial Planning Standards Board Ltd.<br>國際金融理財標準委員會                           | Certified Financial Planner<br>認可財務策劃師                                 | CFP                 | <a href="https://www.fpsb.org">https://www.fpsb.org</a>  |
| The Institutes<br>美國特許財產保險學會   | Chartered Property Casualty Underwriter<br>會士                          | CPCU                | <a href="http://www.theinstitutes.org">http://www.theinstitutes.org</a>  |
| CFA Institute<br>CFA協會   | The Chartered Financial Analyst<br>特許金融分析師                             | CFA                 | <a href="http://www.cfainstitute.org/">http://www.cfainstitute.org/</a><br><a href="http://www.hksfa.org">http://www.hksfa.org</a> |
|  | Certificate in Investment Performance<br>Measurement<br>投資表現衡量證書       | CIPM                |  |
| Institute of Actuaries of England<br>英國精算師學會                                     | Fellow<br>會員   | FIA                 | <a href="http://www.actuaries.org.uk">http://www.actuaries.org.uk</a>  |
| Faculty of Actuaries in Scotland<br>蘇格蘭精算師學會                                     | Fellow<br>會員   | FFA                 | <a href="http://www.actuaries.org.uk">http://www.actuaries.org.uk</a>  |
| Institute of Actuaries of Australia<br>澳洲精算師學會                                   | Fellow<br>會員   | FIAA                | <a href="http://www.actuaries.asn.au">http://www.actuaries.asn.au</a>  |
| Society of Actuaries of the United States of America<br>美國精算師公會                  | Fellow<br>會員   | FSA                 | <a href="http://www.soa.org">http://www.soa.org</a>  |
| Life Underwriters Association of Hong Kong<br>香港人壽保險從業員協會                        | Fellow Chartered Financial Practitioner<br>特許財務策劃師                     | FChFP               | <a href="http://www.luahk.org">http://www.luahk.org</a>  |
| Hong Kong Society of Certified Insurance Practitioners<br>香港保險師公會                | Hong Kong Insurance Professional Qualification Examination<br>香港保險師專業試 | HKIPQE              | <a href="http://www.hkcip.org.hk">http://www.hkcip.org.hk</a>  |
| Life Underwriter Training Council<br>美國壽險訓練學院                                    | Fellow<br>院士   | LUTCF               | <a href="http://www.naifa.org">http://www.naifa.org</a>  |
| Vocational Training Council<br>職業訓練局   | Professional Diploma in Insurance Programme<br>專業文憑課程 - 保險學            | PDI                 | <a href="http://www.vtc.edu.hk">http://www.vtc.edu.hk</a>  |
| The Chartered Insurance Institute<br>英國特許保險學院                                    | Hong Kong Diploma in Insurance Studies<br>保險學 - 香港文憑                   |                     | <a href="http://www.cii.co.uk">http://www.cii.co.uk</a>  |
| Hong Kong Securities and Investment Institute<br>香港證券及投資學會                       | Foundation Programme Examination<br>基本課程考試                             | FPE                 | <a href="http://www.hksi.org">http://www.hksi.org</a>  |
|  | Diploma Programme Examination<br>文憑課程考試                                | DPE                 |  |
|  | HKSI Practising Certificate<br>從業員資格證書                                 |                     |  |
|  | HKSI Specialist Certificate<br>高級從業員資格證書                               |                     |  |
|  | HKSI Professional Diploma in Financial Markets<br>金融市場專業文憑             |                     |  |





## Close enough to make the right decisions?

When it comes to underwriting a major risk, you want a quick response from a specialist who sees what you see. At LIU our underwriters aren't far away. They're decision-makers with the knowledge to understand your risk and the authority to give you a quick decision.

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**Liberty**  
International  
Underwriters

|   | Tel. 電話                             | Fax. 傳真          |
|---|-------------------------------------|------------------|
| <b>Hong Kong 香港</b>   |                                     |                  |
| Hong Kong Chamber of Insurance Intermediaries (HKCII)<br>香港保險中介人商會                                  | 8108 1238                           | 8108 1282        |
| Chinese Insurance Association of Hong Kong Ltd.<br>香港華商保險公會有限公司                                     | 2815 7700                           | 2541 0615        |
| Chinese Underwriters Club (CUC)<br>保險從業華員會  |                                     |                  |
| LOMA Society of Hong Kong (LOMA)<br>香港壽險管理學會  | 6017 2233                           |                  |
| General Agents and Managers Association of HK Ltd. (GAMA)<br>香港人壽保險經理協會                             | 2893 9699                           | 2832 9822        |
| Hong Kong Confederation of Insurance Brokers (CIB)<br>香港保險顧問聯會                                      | 2882 9943                           | 2890 2137        |
| Hong Kong Federation of Insurers -<br>Insurance Agents Registration Board (HKFI)<br>香港保險業聯會-代理登記委員會 | 2520 1868                           | 2520 1967        |
| Hong Kong General Insurance Agents Association Ltd. (GIAA)<br>香港一般保險代理協會                            | 8108 1909                           | 8103 1909        |
| Hong Kong Society of Certified Insurance Practitioners (HKCIP)<br>香港保險師公會                           |                                     |                  |
| Independent Financial Advisers Association Limited (IFAA)<br>獨立理財顧問協會有限公司                           | 3115 7616                           | 3115 7630        |
| Insurance Claims Complaints Bureau (ICCB)<br>保險索償投訴局  | 2520 1868                           | 2520 1967        |
| The Chartered Insurance Institute<br>英國特許保險學院   | 2520 0098                           | 2295 3939        |
| Life Underwriters Association of Hong Kong (LUA)<br>香港人壽保險從業員協會                                     | 2570 2256                           | 2570 1525        |
| Mandatory Provident Fund Schemes Authority (MPFA)<br>強制性公積金計劃管理局                                    | 2918 0102                           | 2259 8806        |
| Motor Insurers' Bureau of Hong Kong (MIBHK)<br>香港汽車保險局  | 2866 9681                           | 2866 9536        |
| Office of the Commissioner of Insurance (OCI)<br>保險業監理處   | 2867 2565                           | 2869 0252        |
| Professional Insurance Brokers Association (PIBA)<br>香港專業保險經紀協會                                     | 2869 8515                           | 2770 2372        |
| <b>Macau 澳門</b>   |                                     |                  |
| Federation of Macau Professional Insurance Intermediaries   | (853) 2870 3268                     | (853) 2870 3266  |
| Macau Insurers' Association   | (853) 2851 1923                     | (853) 2833 7531  |
| Macau Insurance Agents and Brokers Association  | (853) 2833 1661                     | (853) 2857 0848  |
| Association of Macau Financial Employees  | (853) 2856 7541                     | (853) 2856 7541  |
| <b>China 中國</b>   |                                     |                  |
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## 歡迎以下新會員加入HKCII， 有您的參與絕對能幫助本會的會務發展， 個個都重要，一個都不能少。

### 公司會員

#### Full Member (FM)

- 持有效商業登記在香港經營保險中介業務的公司或機構  
An organization who carries on business in Hong Kong as an insurance intermediaries under a valid business registration
- 只有「公司會員」之「公司代表」方可作為商會的理事  
Only the Nominee of the Full Member shall be a committee member of the Executive Committee of HKCII

Ka Fu Insurance Services Ltd

Nominee: Mr. Kenny Ko Ka Yiu

Nation Asia Insurance Consultancy Ltd

Nominee: Mr. Cheung Wing Choi

Mpfsupermart Company Limited

Nominee: Mr. Chris Lai Yan Cheong

### 個人會員

#### Individual Member (IM)

- 在香港從事保險中介業務的個人  
An insurance intermediary who carries on business in Hong Kong

Ms. Karine Chung Ying Shan

Ms. Fandy Chiu Wai Chun

Ms. Ashley Lo Shuk Kwan

Ms. Susan Sze Chow Wan

Mr. Stephen Li Wo Chiu

Mr. Chan For Kam

Mr. Anthony Chan Chun Hin

Mr. Bruce Tang Mun Sing

Mr. Ngan Yat Fan

Mr. Gary Wong Lap Tak

Mr. Shi Xin Xin

Mr. Lai Kwok Leung

#### Corporate Associate Member (CA)

ACE Insurance Ltd

Nominee: Mr. Patrick Wong

### Membership Composition 會員類別

#### • Full member

is an organisation who carries on business in Hong Kong as an insurance intermediary under a valid business registration certificate issued by the SAR Government of Hong Kong and is to be represented by a Nominee of such organisation registered with the Chamber and duly accepted by the Chamber. (A "Nominee" is an Individual Member of the Chamber who is the chief or a very senior executive officer of, and nominated by a Full Member)

**Registration fee : Free Annual subscription : HK\$750**

#### • Individual member

is an insurance intermediary who represents himself in person in the Chamber and duly accepted by the Chamber

**Registration fee : Free Annual subscription : HK\$250**

#### • Corporate Associate member

is an organisation whose business activities are closely related to the insurance industry and duly accepted by the Chamber. Corporate Associate Membership is entitled to nominate up to five nominees.

**Registration fee : Free Annual subscription : HK\$1,200**

#### • Individual Associate member

is a person or an organisation whose business activities are closely related to the insurance industry and duly accepted by the Chamber.

**Registration fee : Free Annual subscription : HK\$250**

### Membership Benefits 會員權益

- To develop skills and enhance professional knowledge through attending Seminars and or Forums organized by the Chamber from time to time.
- To keep update of the current changes and development in the market place via our regular Newsletters issued to the members.
- To develop contacts and establish relationship in the market via our various fellowship gathering and functions.
- To voice out members' concern to liaise with regulatory bodies for the common interest of insurance intermediaries as a whole.

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香港保險中介人商會年刊誌慶

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## 編者的話

香港保險中介人商會年刊與展望，每年都會收集並記錄業界當年的工作、活動和貢獻。內容全賴商會內每一位理事及一些熱心會員努力的耕耘和不撓的付出。

本刊內容包括本會會長的話，嘉賓賀詞，並邀請保險界知名人士，關於業界內各專題作多方面的探討。

在整本刊物製作籌備過程中，包括資料搜集、活動花絮、撰寫文章、編輯校對和招請各界廣告支持等；均經歷巨大心思、精神和時間。本人在此多謝各位理事於百忙中貢獻出寶貴時間，義務登場，但你們付出的時間和心思定沒有白費，當會為此感到滿足的。盼望來年有更多熱心支持者，一齊努力，豐富此刊物內容，使其有更多資訊性和趣味性。

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| <input type="checkbox"/> 公司會員 (FM)<br>Full Member       | <input type="checkbox"/> 聯繫公司會員 (CAM)<br>Corporate Associate Member  |
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|  |                                     |              |
|--|-------------------------------------|--------------|
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| 手提電話：<br>Mobile Contact  | 公司電話：<br>Office No.                 | 傳真：<br>Fax   |
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| (1) |                       |         |          |
| (2) |                       |         |          |
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