香港保險顧問聯會
THE HONG KONG CONFEDERATION OF INSURANCE BROKERS

Holistic establishment of Client Needs 全面財富管理規劃	
Date :	12 December 2022 (Monday)
Time :	4:00pm – 6:00pm

Course Outline:

The course content will cover the following topics:

- Positioning of insurance in wealth management planning
- Analysis the gaps in wealth planning for middle class families
- Case study and application of insurance products

Speaker:

Alvin Lam, M. Sc. (Finance), M. Soc. Sc (Counselling), CMC®, CFP®

Alvin is the President of the Family Financial Education Institute. He is also an independent money coach, professional trainer and seminar speaker.

He has been working in the financial services industry for more than 25 years, dedicating more than twenty years in the areas of training & development. Prior to his current positions, he held a number of senior management positions in different international financial groups, including AGM & Head of Sales Planning, Vice President & Head of Bancassurance, as well as Head of Agency Training, Development & Recruitment.

Alvin conducts numerous workshops on personal finance and people development and is a sought-after speaker at various industry and public seminars and conferences, particularly on the areas of personal finance and career planning. Every year he has been invited to conduct more than 200 sessions of seminars, workshops and individual financial consultations.

Alvin holds a Master degree in Counselling (HKU), a Master degree in Finance (CUHK) and a Bachelor degree in Social Sciences (HKU). He is the first Certified Money Coach awarded by the US Money Coaching Institute in Hong Kong, the first batch of CFP® by both the IFPHK and the FPSB China. He also has many other professional designations and memberships, CLU directly awarded by the American College, Certified NLP Practitioner, MBTI® Administrator, CFQCC by the American Institute of Applied Psychology and Coaching Clinic® Licensed Facilitator by the Corporate Coach U are some of them.