善用保險產品達至教育儲備規劃

How to utilize Insurance Products in Planning for Education costs

Date :	9 November 2023 (Thursday)
Time :	3pm – 5pm

This course will be delivered in Cantonese.

Course Outline

The course content will cover the following topics:

- Overview on local and overseas education
- Costing for Education
- Education savings planning consideration
- Life insurance application on education fund planning

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.