

**Insurance Intermediaries Quality Assurance Scheme**  
**List of Currently Approved CPD Activities**

Ref.	Name of Organizer	Title of CPD Activity	No. of modules	No. of CPD hours	No. of CPD hours	Expiry Date
INS-CPD-2017-13	IFS, City University of Macau & Int'l Assoc. of Registered Financial Consultants H.K and Macau Centre Co. Ltd.	Professional Certificate in Financial Consulting (Executive Program)	---	14	14	---
INS-CPD-2017-18	YF Life Insurance International Limited	New Consultants Orientation Program	5	13	13	30/11/2025
INS-CPD-2018-02	IFS & International Training and Testing Center of City University of Macau	Company and Contract Law		10	10	---
INS-CPD-2018-11	IFS & International Training and Testing Center of City University of Macau	Claims Management		10	10	---
INS-CPD-2018-12	IFS & International Training and Testing Center of City University of Macau	Financial Planning		10	10	---
INS-CPD-2018-13	IFS & International Training and Testing Center of City University of Macau	Life Insurance-Basic Actuarial Planning and Control		10	10	---
INS-CPD-2018-14	IFS & International Training and Testing Center of City University of Macau	Risk Management		10	10	---

Ref.	Name of Organizer	Title of CPD Activity	No. of modules	No. of CPD hours	No. of CPD hours	Expiry Date
INS-CPD-2018-15	IFS & International Training and Testing Center of City University of Macau	Credit Insurance		10	10	---
INS-CPD-2018-16	Macau Institute of Financial Services	Law of Inheritance in Macao		5	5	---
INS-CPD-2018-17	Macau Institute of Financial Services	Credit Risk Management for Corporate Banking: Red Flag Credit Warning Signal for Corporate Borrower		12	12	---
INS-CPD-2018-26	Macau Institute of Financial Services	The Principles of Risk Management		5	5	---
INS-CPD-2018-27	Macau Institute of Financial Services	Risk Management for Financial Institutions		5	5	---
INS-CPD-2018-37	Macau Institute of Financial Services	Professional Liability Insurance		5	5	---
INS-CPD-2018-58	Macau Institute of Financial Services	Matrimonial Property Regimes in Macao		5	5	---
INS-CPD-2018-59	Macau Institute of Financial Services	Real Estate Law : Real Estate Transactions		5	5	---

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INS-CPD-2018-60	Macau Institute of Financial Services	Real Estate Law : Risk and Financing of Real Estate Transactions		5	5	---
INS-CPD-2018-63	Manulife (International) Limited	Need Based Selling Skills	2	12	12	31/12/2025
INS-CPD-2019-02	Luen Fung Hang Life Limited	“Know more Critical Illness, and the Related Treatment” Seminar*	2	5	5	31/12/2025
INS-CPD-2019-03	Macau Institute of Financial Services	Retirement Planning Management		5	5	---
INS-CPD-2019-04	Macau Institute of Financial Services	Professional Ethics for Financial Practitioners		5	5	---
INS-CPD-2019-05	Macau Institute of Financial Services	Social Responsibilities of the Financial Services Industry		5	5	---
INS-CPD-2019-09	Macau Institute of Financial Services	Innovation and Transformation of InsurTech		6	6	---
INS-CPD-2019-14	Manulife (International) Limited	Law of Marriage and Inheritance in Macao		4	4	17/3/2025
INS-CPD-2019-16	Macau Institute of Financial Services	The Psychology of Investing		3	3	---

Ref.	Name of Organizer	Title of CPD Activity	No. of modules	No. of CPD hours	No. of CPD hours	Expiry Date
INS-CPD-2019-17	Macau Institute of Financial Services	Personality Analysis of Interpersonal Communication Skills		3	3	---
INS-CPD-2019-25	Macau Institute of Financial Services	Guangdong-Hong Kong-Macao Greater Bay Area – Opportunities and Challenges for Macao’s Financial Sector		3	3	---
INS-CPD-2019-34	Macau Institute of Financial Services	The Internationalization of RMB		3	3	---
INS-CPD-2020-02	Macau Institute of Financial Services	New Economy and Macau's Financial Development		5	5	---
INS-CPD-2020-06	IFS & Financial Intelligence Office	Seminar on Anti-Money Laundering and Counter-Financing of Terrorism (AML/CFT)		2	2	---
INS-CPD-2020-09	Macau Institute of Financial Services	Macao’s Company Law		10	10	---
INS-CPD-2020-10	Manulife (International) Limited	Investment Knowledge Workshop	3	18	18	08/04/2025
INS-CPD-2020-13	Macau Institute of Financial Services	Stress Management		5	5	---
INS-CPD-2020-14	Macau Institute of Financial Services	Quality Customer Services		5	5	---

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INS-CPD-2020-15	Macau Institute of Financial Services	Legal Entity: Association and Owners' Committee		5	5	---
INS-CPD-2020-16	IFS & International Training and Testing Center of City University of Macau	Strategic Management of Insurance Agency Team		10	10	---
INS-CPD-2020-17	IFS & International Training and Testing Center of City University of Macau	Customer Relationship Management of Insurance		10	10	---
INS-CPD-2020-18	IFS & International Training and Testing Center of City University of Macau	Personal Financial and Risk Management		5	5	---
INS-CPD-2020-19	IFS & International Training and Testing Center of City University of Macau <sup>[1]</sup>	Provident Fund and Annuity Planning		5	5	---
INS-CPD-2020-20	IFS & International Training and Testing Center of City University of Macau <sup>[1]</sup>	Asset allocation		5	5	---
INS-CPD-2020-21	IFS & International Training and Testing Center of City University of Macau	Enhancement of Human Resource Competitive Advantage by Motivation and Remuneration		5	5	---
INS-CPD-2020-22	IFS & International Training and Testing Center of City University of Macau	Development of Competency for Superior Performance by Performance Management		5	5	---
INS-CPD-2020-23	IFS & International Training and Testing Center of City University of Macau	The Positioning and Economic Framework of Macau		5	5	---

Ref.	Name of Organizer	Title of CPD Activity	No. of modules	No. of CPD hours	No. of CPD hours	Expiry Date
INS-CPD-2020-24	IFS & International Training and Testing Center of City University of Macau	The Financial Markets and Instruments		5	5	---
INS-CPD-2020-25	IFS & International Training and Testing Center of City University of Macau	Principles and Practices of Risk Management		5	5	---
INS-CPD-2020-26	IFS & International Training and Testing Center of City University of Macau	The Risk Management of Macau Financial Institutions		5	5	---
INS-CPD-2020-27	Macau Institute of Financial Services	Positive Thinking		5	5	---
INS-CPD-2020-28	Macau Institute of Financial Services	Effective Skills on Complaint Handling		5	5	---
INS-CPD-2020-29	Macau Institute of Financial Services	Regulatory Aspects of Financial Planning in Macao		5	5	---
INS-CPD-2020-30	Macau Institute of Financial Services	Liability Insurance and Legal Liability Exposure		5	5	---
INS-CPD-2020-33	Macau Institute of Financial Services	Overview of Motor Insurance in the Guangdong-Hong Kong-Macau Greater Bay Area		5	5	---
INS-CPD-2020-36	Macau Institute of Financial Services	Cyber Security		3	3	---

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INS-CPD-2020-38	Macau Institute of Financial Services	Complaint Management and Regulatory Requirements		5	5	---
INS-CPD-2020-39	Macau Institute of Financial Services	Macao Law on Negotiable Instruments		3	3	---
INS-CPD-2020-40	Macau Institute of Financial Services	Improving Workplace Productivity		5	5	---
INS-CPD-2020-42	Macau Institute of Financial Services	Bond Market and Financial Development in Macao		5	5	---
INS-CPD-2020-43	Macau Institute of Financial Services	Macao and Mainland Taxation Regime		5	5	---
INS-CPD-2020-44	Macau Institute of Financial Services	Property Damage Insurance for Large Enterprises		5	5	---
INS-CPD-2020-46	Macau Institute of Financial Services	Adverse Selection in the Insurance Industry		5	5	---
INS-CPD-2020-47	Macau Institute of Financial Services	Advanced Course in Development and Application of FinTech		6	6	---
INS-CPD-2021-02	Macau Institute of Financial Services	Project Insurance and Construction All Risks Insurance		5	5	---

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INS-CPD-2021-03	Macau Institute of Financial Services	Practical knowledge of Listed Corporate Events & Shareholder Rights		6	6	---
INS-CPD-2021-07	Macau Institute of Financial Services	Money Laundering and Case Studies		5	5	---
INS-CPD-2021-08	Macau Institute of Financial Services and Association Of Chong Hang Intellectual Elites	Green Finance and Development of the Greater Bay Area		18	18	---
INS-CPD-2021-09	IFS & International Training and Testing Center of City University of Macau	Mediation decision		5	5	---
INS-CPD-2021-10	IFS & International Training and Testing Center of City University of Macau	Macau Anti-Money Laundering Law		5	5	---
INS-CPD-2021-11	IFS & International Training and Testing Center of City University of Macau <sup>[1]</sup>	Macau Financial Law		5	5	---
INS-CPD-2021-12	Macau Institute of Financial Services	Workplace Persuasion Skills		5	5	---
INS-CPD-2021-13	Macau Institute of Financial Services	Overview of Employment Injury Insurance in Guangdong and Macau		5	5	---
INS-CPD-2021-17	Macau Institute of Financial Services	Introduction to Insurance Clauses in Construction Contracts		5	5	---



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INS-CPD-2021-18	Macau Institute of Financial Services	The Principles and Applications of Index Futures		6	6	---
INS-CPD-2021-19	IFS & Faculty of Business Administration / University of Macau	Introduction to Cross-Boundary Wealth Management		5	5	---
INS-CPD-2021-20	Macau Institute of Financial Services	Notary and Power of Attorney		5	5	---
INS-CPD-2021-21	Macau Institute of Financial Services	Selling Skills for Financial Services		5	5	---
INS-CPD-2021-22	Macau Institute of Financial Services	Reputational Risk Management in Financial Institutions		5	5	---
INS-CPD-2021-23	Macau Institute of Financial Services	RMB Internationalization and Assets Allocation		5	5	---
INS-CPD-2021-25	Macau Institute of Financial Services	Personal Financial Planning		5	5	---
INS-CPD-2021-26	Macau Institute of Financial Services	Foundations of Financial Institutions and Markets		5	5	---
INS-CPD-2021-29	Luen Fung Hang Life Limited	人壽保險實務操作講座	2	5	5	31/8/2025

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INS-CPD-2021-30	Macau Institute of Financial Services	Overview of Home Insurance		5	5	---
INS-CPD-2021-31	Macau Institute of Financial Services	Introduction of Inherent Defect Insurance (IDI)		5	5	---
INS-CPD-2021-35	YF Life Insurance International Limited	Advanced Selling Strategies	4	17	17	15/2/2025
INS-CPD-2021-38	Macau Institute of Financial Services	Cyber Insurance		5	5	---
INS-CPD-2021-39	Macau Institute of Financial Services	Anti-Money Laundering-Risk Categorization and Enhanced Due Diligence Process		5	5	---
INS-CPD-2022-01	Macau Institute of Financial Services	Practical Financial Document Writing		10	10	---
INS-CPD-2022-04	Macau Institute of Financial Services	Macao and Mainland Taxation Regime		5	5	---
INS-CPD-2022-05	Macau Institute of Financial Services	Selling Master		5	5	---
INS-CPD-2022-06	Macau Institute of Financial Services	Introduction to Cross-Boundary Wealth Management		5	5	---

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INS-CPD-2022-08	INS-CPD-2022-08-A Macau Institute of Financial Services Limited INS-CPD-2022-08-D ICBC (Macau) Pension Fund Management Company Limited	Insurance (Module IV) – Pension Fund	-	10	10	(A) --- (D) INS-CPD-2022-08-D 31/5/2025
INS-CPD-2022-12	YF Life Insurance International Limited	Medical & Health Insurance Training Series II (5 modules)		10	10	15/3/2023
INS-CPD-2022-13	Macau Institute of Financial Services	Introduction to International Finance		5	5	---
INS-CPD-2022-14	Macau Institute of Financial Services	Insurance (Module I) – Principles and Practice of Insurance		5	5	---
INS-CPD-2022-15	Macau Institute of Financial Services	Insurance (Module II) – Non Life Insurance		5	5	---
INS-CPD-2022-16	Macau Institute of Financial Services	Insurance (Module III) – Life Insurance		5	5	---
INS-CPD-2022-17	Macau Institute of Financial Services	Insurance (Module V) – Investment-Linked Long Term Insurance		5	5	---

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INS-CPD-2022-19	Manulife (International) Limited	淺淡中醫-常見癌症的預防及治療		6	6	30/5/2025
INS-CPD-2022-21	Macau Institute of Financial Services & Macau Anti-Money Laundering Specialists Association	Macau Anti-Money Laundering Professional, MAMLP		18	18	---
INS-CPD-2022-22	Macau Institute of Financial Services & Macau Anti-Money Laundering Specialists Association	Macau Anti-Money Laundering Specialist, MAMLS		15	15	---
INS-CPD-2022-23	Macau Institute of Financial Services	Introduction to Financial Insurance		5	5	---
INS-CPD-2022-24	Macau Institute of Financial Services & CPA Australia & Macau Society of Registered Accountants	Webinar - IFRS 17: Insurance Contracts		1.5	1.5	---
INS-CPD-2022-25	Macau Institute of Financial Services & Macau Financial Law Association & 珠海橫琴琴澳金融行業協會及橫琴金融行業協會	Advanced Course in Henqin-Macao Cross-Border Wealth Management (Studies and Observations Group)		5	5	---
INS-CPD-2022-26	Macau Institute of Financial Services	Corruption Prevention Regime		5	5	---
INS-CPD-2022-27	Macau Institute of Financial Services	Basic Banking Knowledge		10	10	---

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INS-CPD-2022-28	Macau Institute of Financial Services & Macau Institute of Management	Improving persuasive skills workshop		6	6	---
INS-CPD-2022-29	Macau Institute of Financial Services	Personal data protection regime in Macau		5	5	---
INS-CPD-2022-31	Macau Institute of Financial Services & Macau Institute of Management	Essential financial knowledge for non-finance staffs		6	6	---
INS-CPD-2022-32	Macau Institute of Financial Services	Theory and Application of the Macao Trust Law		<u>10.5 hours</u> (Before Mar, 2023: 9 hours)	<u>10.5 hours</u> (Before Mar, 2023: 9 hours)	---
INS-CPD-2022-33	Macau Institute of Financial Services	Individual and Group Medical Insurance		5	5	---
INS-CPD-2023-01	Macau Institute of Financial Services & Macau Institute of Management	Professional Negotiation Skills		7	7	---
INS-CPD-2023-03	AXA China Region Insurance Company (Bermuda) Limited	Financial Planning & Basic Insurance Knowledge	4	10	10	31/12/2025
INS-CPD-2023-05	Macau Institute of Financial Services & Macau Institute of Management	Business Communication and Closing Skills		6	6	---

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INS-CPD-2023-06	China Life Insurance (Overseas) Company Limited Macau Branch	財務策劃工作坊	-	5	5	---
INS-CPD-2023-07	Macau Institute of Financial Services	Practical Knowledge in Bond Markets		5	5	---
INS-CPD-2023-08	Macau Institute of Financial Services	Investment Instruments and Financial Planning		3	3	---
INS-CPD-2023-09	Macau Institute of Financial Services	Problem Loan Management		<u>6 hours</u> Before March, 2023: 5 hours	<u>6 hours</u> Before March, 2023: 5 hours	---
INS-CPD-2023-11	Macau Institute of Financial Services & Macau Institute of Management	The Basics of the Metaverse and Blockchain		12	12	---
INS-CPD-2023-12	Macau Institute of Financial Services & Macau Institute of Management	Overview of Macao Registration and Notarization Law		3	3	---
INS-CPD-2023-13	Macau Institute of Financial Services	Overview of Macau Automobile Insurance Regime	---	5	5	---
INS-CPD-2023-14	Macau Institute of Financial Services & Macau Institute of Management	The Property Law and Obligation Law of Macao	---	3	3	---

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INS-CPD-2023-15	Macau Institute of Financial Services	Overview of Life Insurance Products and Product Governance	---	5	5	---
INS-CPD-2023-16	Macau Institute of Financial Services & Macau Institute of Management	Anti-bribery and Compliance Audit Workshop	---	6	6	---
INS-CPD-2023-17	Macau Institute of Financial Services	Advanced Course in Guangzhou-Macao Cross-Border Green Finance	---	10	10	---
INS-CPD-2023-18	Macau Institute of Financial Services	Macau Financial Law Course Series - Financial Securities		18	18	---
INS-CPD-2023-21	Macau Institute of Financial Services	Basic Knowledge on Bank Lending	---	10	10	---
INS-CPD-2023-22	Macau Institute of Financial Services & Macau Institute of Management	Contract Law of Macao	---	3	3	---
INS-CPD-2023-24	Macau Institute of Financial Services & Macau Institute of Management	Overview of Macau Commercial Law	---	3	3	---
INS-CPD-2023-25	Macau Institute of Financial Services & City University of Macau	Chartered Financial Analyst - Level I Exam Preparation	---	10	10	---

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INS-CPD-2023-26	Macau Institute of Financial Services & Macau Insurance Industry Professionals Associations	Actuarial Knowledge	---	5	5	---
INS-CPD-2023-27	Macau Institute of Financial Services	Financial Institutions Internal Control	---	5	5	---
INS-CPD-2023-28	Macau Institute of Financial Services & Macau Institute of Management	Overview of Macao Civil Procedure Law	---	3	3	---
INS-CPD-2023-29	Macau Institute of Financial Services & Macau Institute of Management	Overview of The Family Law and Inheritance Law of Macao	---	3	3	---
INS-CPD-2023-30	Macau Institute of Financial Services & Macau Institute of Management	Dealing with legal issues and procedures after a road accident	---	3	3	---
INS-CPD-2023-33	Macau Institute of Financial Services	Introduction to Financial Planning	---	5	5	---
INS-CPD-2023-34	Manulife (International) Limited	Introduction to Macao Commercial Law, Macao Trust Law, Macao Personal Data Protection Act	3	8	8	15/11/2025
INS-CPD-2024-01	AIA International Limited	Agency Leader Development Program	-	10	10	31/12/2026



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INS-CPD-2024-02	YF Life Insurance International Limited	Advanced Selling Skills Course	-	5	5	31/1/2025
INS-CPD-2024-03	Macau Institute of Financial Services & Macau Institute of Management	Public Speaking and Presenting at Work	-	6	6	---
INS-CPD-2024-04	YF Life Insurance International Limited	如何運用DISC提升銷售效能II	-	3	3	15/3/2025
INS-CPD-2024-05	Macau Institute of Financial Services & Macau Institute of Management	澳門刑法概述	-	3	3	15/3/2025
INS-CPD-2024-06	YF Life Insurance International Limited	Financial Calculations Learning - Asset Valuation	-	2	2	15/3/2025
INS-CPD-2024-07	Macau Institute of Financial Services	Overview of Macau Insurance Intermediary Supervision	-	5	5	---
INS-CPD-2024-08	Macau Institute of Financial Services	Overview of Macau Private Pension and Non-Mandatory Central Provident Fund System	-	5	5	---
INS-CPD-2024-09	Macau Institute of Financial Services	The Principles and Application of Derivative Warrants	-	5	5	---

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INS-CPD-2024-10	Macau Institute of Financial Services & Macau Institute of Management	Dealing with complaints and difficult customers	-	6	6	---
INS-CPD-2024-11	Manulife (International) Limited	如何成為銷售達人	2	4	4	30/4/2025
INS-CPD-2024-12	Macau Institute of Financial Services & Macau University of Science and Technology	香港證券及期貨從業員資格考試培訓課程(卷一)	-	10	10	---
INS-CPD-2024-13	Luen Fung Hang Life Limited	大灣區跨境糾紛多元化解機制概況及調解實務講座	-	5	5	15/5/2025
INS-CPD-2024-15	Macau Institute of Financial Services	Overview of Macao Labour Relations Law	-	5	5	---
INS-CPD-2024-16	YF Life Insurance International Limited	Derivatives Knowledge	-	2	2	15/6/2025
INS-CPD-2024-17	Macau Institute of Financial Services	Sanctions Compliance and Corporate Governance	-	5	5	---
INS-CPD-2024-18	Luen Fung Hang Life Limited	投訴處理與客戶滿意度提升	-	5	5	15/9/2025

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INS-CPD-2024-19	YF Life Insurance International Limited	The Future Economics Trend of Asia	-	4	4	15/7/2025
INS-CPD-2024-20	AXA China Region Insurance Company (Bermuda) Limited	強化財務策劃能力	4	10	10	15/7/2025
INS-CPD-2024-21	Macau Institute of Financial Services	Excellent customer service skills for financial representatives	-	3	3	---
INS-CPD-2024-22	Macau Institute of Financial Services	Introduction to Travel Insurance and Study Aboard Insurance	-	5	5	---
INS-CPD-2024-23	Manulife (International) Limited	保險法課程	-	6	6	15/8/2025
INS-CPD-2024-24	Macau Institute of Financial Services	Anti-money Laundering Efforts of Private Banks	-	5	5	---
INS-CPD-2024-25	Macau Institute of Financial Services & Macau Institute of Management	Overview of the Judicial System and Judicial Litigation in Macao	-	3	3	---
INS-CPD-2024-26	Macau Institute of Financial Services	Overview of Macao Economic Law Regime	-	5	5	---

Ref.	Name of Organizer	Title of CPD Activity	No. of modules	No. of CPD hours	No. of CPD hours	Expiry Date
INS-CPD-2024-27	YF Life Insurance International Limited	保險銷售合規與案例研討	-	3	3	15/8/2025
INS-CPD-2024-28	Macau Institute of Financial Services	Fundamentals of Big Data and Its Implication to Financial Services	-	10	10	---
INS-CPD-2024-29	Monetary Authority of Macao & Macau Institute of Financial Services	2024 Insurance AML Seminar – AML Knowledge Sharing for Insurance Intermediary	-	3	3	---
INS-CPD-2024-30	IFS & International Training and Testing Center of City University of Macau	Changes resulted from the New Insurance Intermediary Ordinance	-	2	2	---
INS-CPD-2024-31	Macau Institute of Financial Services	Fundamentals of Bond Investment	-	5	5	---
INS-CPD-2024-32	YF Life Insurance International Limited	公司法與繼承法初探	-	2	2	---
INS-CPD-2024-33	Manulife (International) Limited	Knowing about underwriting	-	6	6	---
INS-CPD-2024-34	Fidelidade Macau - Insurance Company Limited	Risk Management Today	10	10	10	---

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INS-CPD-2024-35	Macau Institute of Financial Services Testing Center of City University of Macau	Financial Market Data Analysis and Collection	-	5	5	---
INS-CPD-2024-36	Macau Institute of Financial Services	Fundamentals of Artificial Intelligence and Its Implication to Financial Services	-	10	10	---
INS-CPD-2024-37	Macau Institute of Financial Services	Introduction of Development of Great Bay Area & Cross-Boundary Wealth Management	-	5	5	---
INS-CPD-2024-38	AIA International Limited	Comprehensive view on Economics, Financial Management and Compliance	-	10	10	---
INS-CPD-2024-39	Macau Institute of Financial Services & The Hong Kong Institute of Bankers	Specialist Certificate in Green Finance and Sustainability	-	5	5	---
INS-CPD-2024-40	Macau Institute of Financial Services	Innovative Financial Models of Web3	-	5	5	---
INS-CPD-2024-41	Macau Institute of Financial Services	Cybersecurity Introduction and Awareness Training	-	5	5	---
INS-CPD-2025-01	Macau Institute of Financial Services & Macao Polytechnic University	金融科技與行業實踐課程	-	15	15	---

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INS-CPD-2025-02	FWD Life Insurance Company (Macau) Ltd.	2025 Finanacial Planning Series	4	10	5	31/12/2025
INS-CPD-2025-03	YF Life Insurance International Limited	2025 Financial Planning Series	-	3	3	31/12/2025
INS-CPD-2025-04	Macau Institute of Financial Services	Cross-Border Finance & Its Related Business Development	-	5	5	---
INS-CPD-2025-05	Macau Institute of Financial Services	Fundamental X of “Exclusion and excluded item” in type of insurance product	-	5	5	---
INS-CPD-2025-06	AXA China Region Insurance Company (Bermuda) Limited	金融市場分析及反洗錢知識	4	10	10	31/1/2026
INS-CPD-2025-07	Macau Institute of Financial Services	Navigating Global Market Trends: Opportunities and Challenges” Seminar	-	2	1	---
INS-CPD-2025-08	China Life Insurance (Overseas) Co. Ltd.	認識投資工具與風險管理	4	10	10	28/2/2026
INS-CPD-2025-09	YF Life Insurance International Limited	澳門稅務知識	-	2	2	28/2/2026