

ELITE TALENT DEVELOPMENT PROGRAMME

Since 2021

Major Objectives

Transferring knowledge and skills of insurance veterans

Nurturing young executives or insurance practitioners

Offering chance for network building



Since 2021, **89** mentees from different professions of insurance companies

- Asset and Investment Management
- Claims Management
- Customer Servicing
- Data and Technology
- Distribution and Sales
- Finance and Actuarial
- Human Resources Management
- Sales and Marketing
- Policy Administration
- Product and Service Development
- Reinsurance Management
- Risk Management, Legal and Compliance
- Underwriting



2022



2023



2024



2025

ETDP

since 2021

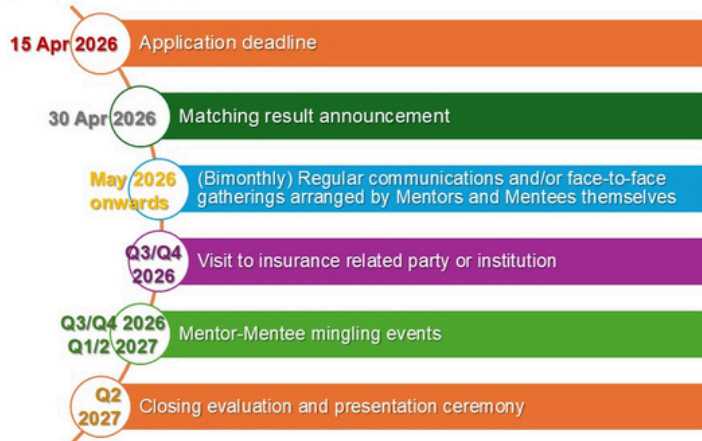
Website: <https://etdp.hkfi.org.hk/>

Term



- One year programme
- Duration: May 2026 to April 2027
- Mentees must complete a full one-year term of the Programme once a Mentor is assigned. In case the Mentee decides to leave the industry, the mentorship arrangement would be terminated.
- In case the Mentor has to quit the Programme during the term, a new Mentor will be assigned to the Mentee.

Important Dates



Role of Mentee

Eligibility and Enrollment

- Young executives/industry practitioners with 5 - 10 years of working experience in our industry.
 - (i) Enrollment with endorsement of Member Company; or
 - (ii) Nominated by Member Company.
- Nominees should demonstrate willingness to be actively involved in industry matters.

Roles and responsibilities

- Mentees should take the initiatives to contact his/her Mentor
- Propose his/her own objectives and interested topics and collaborate with the Mentor at any time during the term
- Join HKFI/ETDP activities as invited, including career talks, sharing sessions, industry events, etc.
- Help promote ETDP within his/her company and among the industry through own network, social media, HKFI's LinkedIn page/ website, ETDP newsletter, etc.
- Mentee should take the initiative to keep his/her supervisor or the personnel-in-charge informed about the progress.

Closing Evaluation

- Mentee is suggested to fill in the communication record form and is required to provide feedbacks at the end of the term for the future enhancement of the Programme.

Upon completion of the Programme

- Receive a certificate to be presented at the Closing Ceremony
- Be invited to join the ETDP Alumni/ HKFI activities
- Be invited to help promote ETDP / insurance industry at suitable events

Benefits

- Gain practical advice, encouragement and support from Mentor
- Nurture valuable leadership, growth and professional development
- Increase exposure and network building
- Enhance problem-solving and analytic skills
- Learn from the experiences of others

Appreciation and Recognition

- A closing ceremony will be held after the end of the Programme term.



Matching criteria

Mentor's experience and expertise

Mentees' expectation and career aspirations

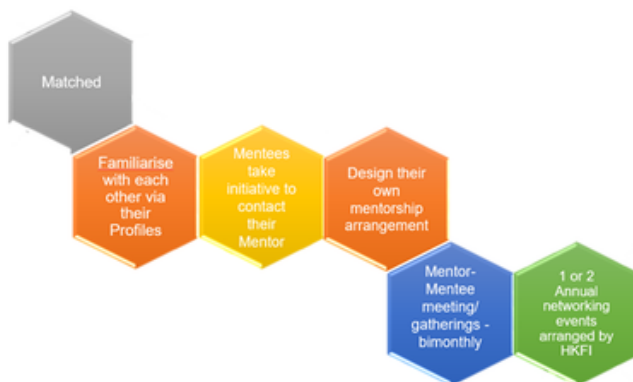


Topics they are interested in learning from Mentor or sharing with Mentee

Insurance type (Life Insurance/General Insurance/Reinsurance)

Job position and nature

Communications between Mentor and Mentee



- Mentees must complete a full one-year term of the Programme once a Mentor is assigned.
- Mentor will receive the personal profile and the interested topics of his/her Mentee(s); while Mentees will have the biography of his/her Mentor, to help them familiarise with each other before first-time communication.
- Mentors and Mentees are given the discretion to decide on the mentorship arrangements/engagements.
- Mentor-Mentee meetings/communication are suggested to be conducted bimonthly (F2F or via Whatsapp/ Videochat/ Phone/ Email/ WeChat/ LinkedIn, etc. as appropriate).

- Mentees should take the initiative to reach out to their Mentors to arrange regular meetings and maintain communication. Additionally, they should strive to attend all networking event(s) for Mentors and Mentees arranged by HKFI during the term.
- Mentee should update his/her Mentor and HKFI as soon as there are any changes in your employment status.

Support of the HKFI

For Mentees

to ensure Mentees are well-connected with their Mentors at the beginning of the Programme, please inform HKFI via email that you have first time communication with your Mentor.

For Both Mentors and Mentees

could communicate with the HKFI Secretariat at any time for following up their cases or problems encountered.

Role of Insurance Company

IMPORTANT

Support from the Nominating Insurer

- Consider mentees' career aspirations, skill gaps, and desired areas of specialisation. **Identify, select** or **nominate mentees** for the programme.
- **Providing necessary resources** to support the mentoring relationship, for example, allowing mentees to attend the mentoring activities during office hour or reimburse appropriate F&B expenses.
- **Facilitating and promoting mentorship.**
- Free programme for mentee, **no enrollment fee** is required.

Mentor

- Offer encouragement and advice to Mentees.
- Passing on Mentors' expertise, skills and knowledge to Mentees.
- Inspire their Mentees.
- Provide advice to overcome challenge and career path development of Mentees.

Each mentor will be allocated one to two mentee(s) in each term.

Mentors of the cohort 2026/2027 (in alphabetical order of surname)

Mr Roddy Anderson	Mr Michael Lee
Ms Charity Au	Mr Mike Lee
Ms Celia Chan	Ms Orchis Li
Ms Elaine Chan	Ms Teresa Ma
Dr Elex Chan	Ms Kelly Mok
Mr Philip Chan	Ms Lilian Ng
Mr Alex Chu	Mr Jimmy Poon, MH
Mrs Agnes Koon	Mr Kenny Siu
Ms Isabella Lau	Mr Anthony Yuen
Ms Karen Lee	Mr Derek Yung

LAST POST & COMPANY SERVED BEFORE RETIREMENT

Mr Roddy Anderson	(Former) Senior Executive Director, Dah Sing Financial Holdings Ltd
Ms Charity Au	(Former) Chief Operating Officer, BOC Group Life Assurance Company Limited
Ms Celia Chan	(Former) Managing Director and Chief Health Officer, HSBC Life Hong Kong
Ms Elaine Chan	(Former) Chief Health Officer, Zurich
Dr Elex Chan	(Former) Managing Director, Dao Heng Insurance, Dao Heng Assurance
Mr Philip Chan	(Former) Network Partner Relationship Manager Asia Pacific, AXA XL Insurance Company Ltd
Mr Alex Chu	(Former) CEO, BOCI-Prudential Trustee Ltd
Mrs Agnes Koon	(Former) Director & COO, Falcon Insurance
Ms Isabella Lau	(Former) Chief Customer, Strategy and Transformation Officer, AIA Hong Kong & Macau
Ms Karen Lee	(Former) CEO, Hong Kong and General Counsel, Liberty International Insurance (APAC)
Mr Michael Lee	(Former) COO, FWD Hong Kong
Mr Mike Lee	(Former) Senior Vice President, Operations, YF Life Insurance International Ltd (Former) President, YF Life Trustees Limited
Ms Orchis Li	(Former) General Manager, Gen Re Hong Kong Branch
Ms Teresa Ma	(Former) Senior Vice President, MSIG Insurance (Hong Kong) Ltd
Ms Kelly Mok	(Former) General Manager, Prudential General Insurance Hong Kong Ltd
Ms Lilian Ng	(Former) Managing Director Strategic Business Group/ Regional CEO, Prudential plc
Mr Jimmy Poon, MH	(Former) Chief Executive Officer, Dah Sing Insurance Company (1976) Ltd
Mr Kenny Siu	(Former) Advisor and Head of Sales, Standard Life (Asia) Ltd
Mr Anthony Yuen	(Former) Chairman, Yue Tung Wealth Management Ltd
Mr Derek Yung	(Former) CEO, Prudential HK Ltd.