

ELITE TALENT DEVELOPMENT PROGRAMME

Since 2021

**The 5th Cohort (2025/2026)
Open for nomination now**

Major Objectives

Transferring knowledge and skills of insurance veterans

Nurturing young executives or insurance practitioners

Offering chance for network building

Term

- One year programme
- Duration: **May 2025 to April 2026**

Since 2021, **71** 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



ETDP
since 2021

<https://minisites.hkfi.org.hk/etdprogramme/en/index.html>

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.
- Mentees 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 feedback at the end of the term for the future enhancement of the Programme.

Upon Completion of the Programme

- Receive a report incorporating Mentor's general advice & recommendations.
- Receive a certificate to be presented at the Closing Ceremony.
- Be invite 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; and
- Learn from the experiences of others.

Appreciation and Recognition

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



Important Dates



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 2025/2026

(in alphabetical order of surname)

Mr Roddy Anderson

Ms Elaine Chan

Mr Philip Chan

Mr Alex Chu

Mr Mike Lee

Ms Teresa Ma

Ms Kelly Mok

Mr Jimmy Poon

Ms Cynthia Sit

Mr Allan Yu

Mr Anthony Yuen

Mr Derek Yung

LAST POST & COMPANY SERVED BEFORE RETIREMENT

Mr Roddy Anderson	(Former) Senior Executive Director Dah Sing Financial Holdings Ltd
Ms Elaine Chan	(Former) Chief Health Officer Zurich
Mr Philip Chan	(Former) Network Partner Relationship Manager Asia Pacific AXA XL Insurance Company Ltd
Mr Alex Chu	(Former) CEO BOCI-Prudential Trustee Ltd
Mr Mike Lee	(Former) Senior Vice President, Operations, YF Life Insurance International Ltd (Former) President YF Life Trustees Limited
Ms Teresa Ma	(Former) Senior Vice President MSIG Insurance (Hong Kong) Ltd
Ms Kelly Mok	(Former) General Manager Prudential General Insurance Hong Kong Ltd
Mr Jimmy Poon, MH	(Former) Chief Executive Officer Dah Sing Insurance Company (1976) Ltd
Ms Cynthia Sit	(Former) Chief Human Resources Officer Sun Life Hong Kong
Mr Allan Yu, BBS	(Former) CEO Tahoe Life Insurance Company Ltd
Mr Anthony Yuen	(Former) Chairman Yue Tung Wealth Management Ltd
Mr Derek Yung	(Former) CEO Prudential HK Ltd.

Matching criteria

Mentor's experience and expertise

Mentees' expectation and career aspirations

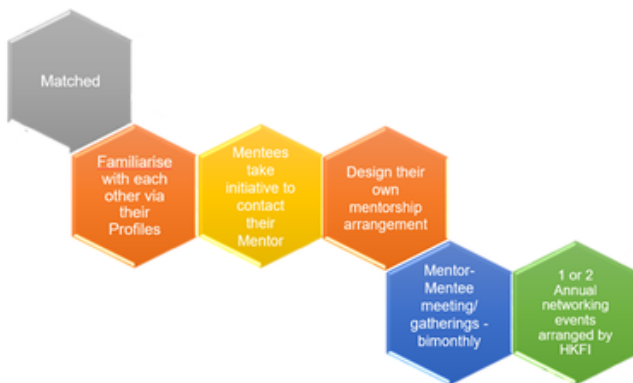


Topics they are interested in learning from Mentor or sharing with Mentee

Insurance type (Life Insurance/General Insurance/Reinsurance)

Job position and nature

Communications between Mentor and Mentee



- 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 meeting/communications are suggested to be conducted bimonthly (F2F or via Whatsapp/ Videochat/ Phone/ Email/ WeChat/ LinkedIn, etc. as appropriate).
- Networking event(s) will be arranged by HKFI each year for all Mentors and Mentees.

- **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.**
- **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 his/her 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.





HKFI Elite Talent Development Programme 2025/2026

Nomination Form/Enrollment Form for Mentee

Please return the form together with a recent passport photo to the HKFI Secretariat by email to communications@hkfi.org.hk by Tuesday, 15 April 2025.

Ref No: EE- _____

**Please attach sheet(s) if more space is required #Optional, multiple selections is accepted. Delete as appropriate*

Personal Information			
Name	English	Chinese	Please provide your recent passport photo
Name of Insurance Company			
Current Position			
Email			
Contact Tel Number	Office	Mobile	
Working Experience in Insurance Industry			
Current and Past Job Nature/ Expertise#	E.g. general insurance/life insurance/actuarial/business development/claims/loss adjusting/risk management and compliance/sales and marketing/underwriting others (please specify)		
<i>Providing detailed information will help us match you with the most suitable mentors</i>			
Please indicate your preferred topics for mentorship			
My Expectation of the Programme			
Ways of communications#	<input type="checkbox"/> Face-to-face gathering <input type="checkbox"/> Phone call <input type="checkbox"/> Whatsapp	<input type="checkbox"/> Email <input type="checkbox"/> Wechat <input type="checkbox"/> LinkedIn	
Where did you learn about this programme?	<input type="checkbox"/> HKFI website or social media <input type="checkbox"/> Colleagues, supervisor, department head <input type="checkbox"/> Friends <input type="checkbox"/> Others: _____		

All information collected is for internal reference and programme arrangement only.

Signed by Authorized Representative/Person-in-charge: _____ Date: _____

For official use	
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