

**By fax or e-mail**

Our ref : A2-002-J25927

To : Authorised Representative, Member Companies, The Hong Kong Federation of Insurers (HKFI)  
Non-HKFI Insurers using HKFI's agent registration service  
Insurance Agents who have appointed Responsible Officers / Technical Representatives  
All Insurance Agents, Responsible Officers and Technical Representatives (Registered Persons) via their appointing Insurer / Insurance Agent

c.c. : Mr Clement Cheung, JP, Commissioner of Insurance, Insurance Authority  
Mr Johnson Wong, President, General Agents & Managers Association of HK  
Mr Roger Tsang, President, HK Chamber of Insurance Intermediaries  
Mr Jackson Pun, Chairman, The HK General Insurance Agents Association Ltd  
Mr Matthew Wong, President, The Life Underwriters Association of HK Ltd

From: Peter C H Tam, Chief Executive

Date : 17 December 2007

Subject : Agent Registration – **Shortening of processing time to three working days**

As you know, the IARB has a service pledge to process an application for agent's registration within four working days. Earlier on I have asked the Secretariat to review the registration system to see if the processing time can be shortened. I am pleased to report that the result is positive.

With effect from 1 January 2008, all registration under normal circumstances\* will be completed within three working days. For this to be achievable, however, each application must contain all of the relevant information and documents as required. A checklist of the required information and documents is attached for your easy reference.



\* Except those applications requiring IARB's consideration of the applicant's fitness and properness as an insurance agent. For enquiries, please contact Ms Ivy Au at 2861 9309.

註冊有限公司 Incorporated with limited liability

香港灣仔駱克道 353 號三湘大廈 29 樓  
29<sup>th</sup> Floor Sunshine Plaza, 353 Lockhart Road, Wanchai, Hong Kong  
電話 Tel: 2520 1868 傳真 Fax: 2520 1967  
網址 Web Site: <http://www.hkfi.org.hk> 電郵 Email: [hkfi@hkfi.org.hk](mailto:hkfi@hkfi.org.hk)

**Insurance Agent Registration Board  
Checklist of Registration Documents**

**(For cross-checking of documents submitted only, no need to return to the IARB)**

	<b>First Registration</b>	<b>Renewal</b>	<b>Additional Registration</b>
	“Application for Registration Forms” & “Confirmation of Registration Forms” and other documents	“Renewal Forms” and other documents	“Application for Registration Forms” & “Confirmation of Registration Forms” and other documents
<b>Individual Agent</b>	<input type="checkbox"/> Form A & A-C <input type="checkbox"/> photo <input type="checkbox"/> copy of HKID card <input type="checkbox"/> copies of academic report showing you have completed education to a level of F.5* <input type="checkbox"/> copies of proof of relevant qualification acquired <input type="checkbox"/> the latest copies of “Annual Return” or “Application for Business Registration” together with “Notifications of Change”** <input type="checkbox"/> original bank receipt of \$410 for registration fee***	<input type="checkbox"/> Form A-R <input type="checkbox"/> photo <input type="checkbox"/> copy of HKID card <input type="checkbox"/> original bank receipt of \$410 for registration fee***	<input type="checkbox"/> Form A & A-C <input type="checkbox"/> original bank receipt *** (\$70 for each subsequent additional insurer)
<b>Insurance Agency</b>	<input type="checkbox"/> Form B & B-C + <input type="checkbox"/> Form C & C-C	<input type="checkbox"/> Form B-R + <input type="checkbox"/> Form C-R	<input type="checkbox"/> Form B & B-C <input type="checkbox"/> Form C & C-C
<b>Responsible Officer of Insurance Agency</b>	<input type="checkbox"/> Form D & D-C	<input type="checkbox"/> Form D-R	<input type="checkbox"/> Form D & D-C

\* Only applicable to Individual Agent, Responsible Officer of Insurance Agency and Technical Representative of Insurance Agency.

\*\* Only applicable to Insurance Agency:

- ◆ For limited company, the latest copies of Annual Return i.e. AR1 to AR3 are required, where applicable
- ◆ For unlimited company, copies of “Application for Business Registration” together with “Notification of Change” are required.

\*\*\* HSBC account no. : 004-511-386468-002

BOC account no. : 070-920000-52182

**Remarks: All copies regarding Individual Agent, Insurance Agency and Responsible Officer of Insurance Agency must be signed by the authorized representative of the appointing insurer.**

**All copies regarding Technical Representative of Insurance Agent must be signed by the Responsible Officer/authorized representative of the appointing insurance agent.**