



錦豐保險管理有限公司

SCF Insurance Management Limited

Agency registration documentation checklist (For Sun Life Agents only)

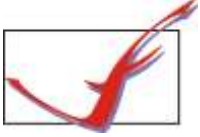
代理登記文件清單 (永明金融代理專用)

Please submit the below documents required for application via email: sunreg@scf.com.hk

請以電郵提交以下申請所需文件至：sunreg@scf.com.hk

- 1 set of softcopy of SCF application form with your signature
您已簽署的錦豐保險申請表電子版本 1 份
Note: Please provide your district and agent code in SCF application form
註：請緊記在錦豐保險申請表內填上您的永明金融分區及代理編號
 - 1 set of softcopy of Asia, MSIG and Zurich agency application form with your signature
您已簽署的亞洲保險、三井住友及蘇黎世代理申請表電子版本各 1 份
 - 1 pcs of softcopy of applicant's Sunlife Business Name Card
申請人之永明金融公司名片電子版本 1 張
 - 1 softcopy of Bank proof, showing applicant's bank account number and applicant's full name
申請人之銀行證明電子版本 1 份，該證明必須同時列明申請人的賬戶號碼及全名
 - 1 softcopy of Asia, MSIG and Zurich agency agreement with your signature
您已簽署的亞洲、三井住友及蘇黎世代理合約電子版本各 1 份
 - 1 softcopy of applicant's education proof - Hong Kong Diploma of Secondary Education Examination (Level 2 or above in 5 subjects, including Chinese or English, and Mathematics) or Hong Kong Certificate of Education Examination (Grade E or above in 5 subjects, including Chinese or English* and Mathematics) **or above**
* Grade C in English (Syllabus A) is recognised as equivalent to Grade E in English (Syllabus B)
申請人學歷證明電子版本 1 份——香港中學文憑考試（五科成績達第 2 級或以上，包括中國語文或英國語文及數學）或香港中學會考（五科成績達 E 級或以上，包括中國語文或英國語文* 及數學）**或以上**
* 英國語文（課程甲）C 級等同於英國語文（課程乙）E 級，兩者均獲認可
- Note: Copy of verification report or notarial certificate is needed if the academic certificate was issued by a Mainland education institution**
註：如學歷證明為內地教育機構發出需提交認證報告或公證書副本
- 1 softcopy of applicant's Hong Kong ID card
申請人之香港身份證電子版本 1 份
 - 1 softcopy of Proof of passing the Examination on General Insurance **certify by District Director or above**
經分區總監或以上職級人員核實簽署的一般保險考試合格證明電子版本 1 份

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- 1 softcopy of Certificate of passing Zurich's Induction Training quiz** (Please visit <https://www.speedyagency.com/registration> and complete the simple quiz on hot selling product and code of conduct for Zurich's orientation training)
蘇黎世迎新培訓合格證明電子版本 1 份 (請前往 <https://www.speedyagency.com/registration> 完成有關熱賣產品及操守守則的蘇黎世保險迎新培訓測驗)

- 1 softcopy of Proof of HKFI/ Insurance Authority General Insurance Registration Record (if applicable)
香港保險業聯會或保險業監管局一般保險登記過往紀錄電子版本 1 份 (如適用)

From 23 September 2024 onwards, the Insurance Authority will charge fees for processing insurance intermediary licence applications and related notifications. About Licensing and Related Fees, please visit Insurance Authority website:

https://www.ia.org.hk/en/supervision/reg_ins_intermediaries/licensing_and_related_fees.html

由 2024 年 9 月 23 日起，保險業監管局將收取保險中介人牌照申請費及相關通知的費用。關於牌照費及相關費用資料，請瀏覽保險業監管局：

https://www.ia.org.hk/tc/supervision/reg_ins_intermediaries/licensing_and_related_fees.html

If you have any queries, please contact Asia, MSIG or Zurich Agency Administration Team.
如有任何查詢，請聯絡亞洲保險、三井住友或蘇黎世代理管理部。

Asia Hotline 熱線電話：3606 9132
Asia Email 電郵地址：francischow@afh.hk

MSIG Hotline 熱線電話：2894 0678
MSIG Email 電郵地址：sarah_pang@hk.msig-asia.com

Zurich Hotline 熱線電話：2968 2223
Zurich Email 電郵地址：agency.admin@hk.zurich.com