

專業服務 Professional Service

我們樂意為您提供專業的風險管理及保險經紀服務，以及不同行業的保險及風險諮詢服務。

We are here to offer you professional risk management and insurance broking services, with dedicated insurance and risk advisory services covering a wide perspective of industries.



風險諮詢服務
Risk Advisory
Services



風險規劃
Risk Mapping



檢討風險
管理政策
Risk Profile Reviewing



風險評估
Risk Consultation

僱員理財教育 Worksite Education

僱員乃企業的重要資產，我們更可為貴公司安排工作坊及講座，提供全面及中立的退休投資教育及理財策劃貼士，以提升他們對公司的歸屬感。當僱員對未來更運籌帷幄，他們將可全情投入工作，不但改善生產力，對公司盈利增長更有顯著幫助。

Employees are important assets to the company. We can assist and support you to conduct onsite workshops and seminars for employees, by providing comprehensive and most importantly, unbiased retirement education and financial planning tips. Not only will it increase their loyalty towards the company; while their financial worries are lifted from their shoulders, you will also see remarkable improvements in productivity and subsequently profitability.



強大的後勤支援 Strong Supporting Teams

進邦滙理為理財顧問提供最全面的後勤服務支援，當中包括：

一般保險支援：我們特別成立一般保險部，提供報價、出單、跟進索償及其他行政上的支援，務求為您提供最高效率及優質的服務。

強積金支援：投資服務部的專業團隊會為您及僱員提供完善的行政支援、專業研究及市場分析，讓您可定期接收最新的市場資訊。僱員更可免費獲享退休策劃諮詢服務，以及定期檢討與調整投資組合及策略。

Altruist has set up strong back up service teams, to support financial consultants in various areas of service, below are some of the highlights:

GI support: A team of General Insurance experts are there to provide efficient and quality support on quotations, policy issuance, follow up claims and other administrative supports, delivering the quality service you deserve.

MPF Support: A designated team of experts from our Investment Services Department can provide you and your employees with timely administration backup and professional research and analysis, keeping you abreast of the latest market update. In addition, your employees can enjoy free retirement planning advisory services, as well as regular review and allocation of the investment portfolio and strategy.

以客為先的服務承諾 Customer-Centric strategy

作為一家獨立理財策劃機構，我們一直堅守誠信及最高專業操守。憑藉「獨立」的競爭優勢，每位理財顧問均以絕對中立的態度，為貴公司提供度身訂造、不偏不倚的理財方案，滿足您的獨特需要。

As one of the leading financial service providers, we always serve our customers with high level of integrity and professionalism. With "independence" as our competitive edge, our consultants are devoted to tailor-made impartial financial solution to meet the unique needs of your company.

請即致電 2297 8000 約見！ Act now and contact our customer hotline at 2297 8000!

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進邦滙理有限公司
Altruist Financial Group Limited

CIB 香港保險顧問聯合會員
Member of the Hong Kong Confederation of Insurance Brokers



進邦滙理有限公司
Altruist Financial Group Limited

企業財務管理專案：

保障周全又靈活 專業支援倍安心

Corporate Financial Management Solution:

Enjoy flexible and comprehensive protection with professional support

公司背景 Background

進邦滙理有限公司於2001年成立，為本港一家獨立理財策劃機構。我們代表客戶，以最高專業操守及利他精神為客戶提供一站式的理財策劃方案。我們與40多家聲譽良好的商業夥伴合作，提供保險、基金、僱員福利計劃、強積金、投資移民、以至個人銀行服務，全面滿足每位客戶的獨特需要。除紮根香港，進邦滙理更取得深圳及寧波首個中外合資保險代理牌照。

過去我們曾為客戶處理超過28,000宗身故及醫療的索償個案，總額高達港幣5億以上。現時，進邦滙理為客戶管理超過 25億的長期儲蓄資產。

Established in 2001, Altruist Financial Group Limited is an Independent Financial Advisor organization. We represent our customers, by providing them one-stop professional financial planning services with the highest level of integrity and altruistic spirit. Partner with over 40 renowned business partners, we now carry a wide array of financial products and services, ranging from insurance, investment funds, employee benefits, MPF, Capital Investment Entrant Scheme, to personal banking services, meeting the unique financial needs of each individual. In addition to our base in Hong Kong, Altruist has obtained the FIRST joint-venture insurance agency license in Shenzhen and Ningbo as well.

Over the past decade, we have handled more than 28,000 death/medical claim cases, and proceeded over HK\$5 billion claim settlement. Today we are managing over 25 billion assets of long term saving for our clients.

以最高專業操守及利他精神 為客戶提供一站式的理財方案
THE HIGHEST LEVEL OF INTEGRITY AND ALTRUISTIC SPIRIT

專業屬會會員資格及牌照

- ✓「香港保險顧問聯會」會員
- ✓「獨立理財顧問協會有限公司」創會會員
- ✓「香港財務策劃師學會」創會會員
- ✓「國際人壽保險市場推廣及研究協會」會員
- ✓「香港人壽保險從業員協會」會員
- ✓「香港人壽保險經理協會」會員
- ✓「證券及期貨事務監察委員會」之認可牌照
- ✓「強制性公積金」中介人牌照

Professional affiliations & licenses

- ✓ Member of Hong Kong Confederation of Insurance Brokers (CIB)
- ✓ Founding Member of Independent Financial Advisors Association Limited (IFAA)
- ✓ Founding Member of The Institute of Financial Planners of Hong Kong Limited (IFPHK)
- ✓ Member of LIMRA International (LIMRA)
- ✓ Member of The Life Underwriters Association of Hong Kong (LUA)
- ✓ Member of General Agents & Managers Association of Hong Kong (GAMA)
- ✓ Licensed by Securities and Futures Commission (SFC)
- ✓ Mandatory Provident Fund Corporate Intermediary

榮譽及獎項

- ★進邦滙理總裁林和平先生獲頒「Visionary of the Year 2010」
- ★全港最有價值公司（自2005年起）
- ★理財策劃業最傑出公司（自2005年起）
- ★商界展關懷商標（2003年起）
- ★2011年家庭友善僱主

Awards

- ★ President Mr. Albert Lam is awarded "Visionary of the Year 2010"
- ★ The Hong Kong's Most Valuable Companies (since 2005)
- ★ The Industry High Flyers in the Financial Planning category (since 2005)
- ★ Caring Company logo (since 2003)
- ★ Family-Friendly Employer 2011

一站式的企業財務管理專案 One-stop Corporate Financial Management Solution

要維持企業的業務長遠發展，關鍵在於有效的風險管理，以及完善的僱員福利計劃。作為專業的財務策劃專家，進邦滙理可透過多元化的產品平台，因應貴公司的業務發展需要，為您度身訂造合適的企業財務管理專案。

The key to successful business growth lies in effective risk management coupled with comprehensive employee benefits programs. With our diverse product platform, we can tailor-made one-stop corporate financial management solution to address your unique business needs.



多元產品 式式俱備 Comprehensive Range of Products

僱員福利 Employee Benefits

一個良好的僱員福利計劃，能增加員工歸屬感及有效提高企業營運效益。

Talent management is curial in improving business efficiency; and one way to enhance employees' loyalty is to provide an attractive employee benefit package.

▶ 強制性公積金計劃	Mandatory Provident Fund
▶ 勞工保險	Employee Compensation
▶ 團體醫療保險	Group Medical Insurance
▶ 團體壽險保障	Group Life Insurance
▶ 團體意外保險	Group Accident Insurance
▶ 團體旅遊保險	Group Travel Insurance
▶ 身體檢查計劃	Medical Checkup
▶ 牙科服務.....	Dental Service...

僱員自選保障 Employee Voluntary Benefits

為僱員提供更周全保障，讓僱主不用花費額外資源，而製造雙贏局面。

除商業保險外，進邦滙理更提供多元化的個人保險產品及一站式的理財保障方案，包括：定期壽險、萬用壽險、投資相連人壽保險、子女教育基金、退休保障、女性保險、旅遊保險、家傭保險、家居保險、個人意外保險、個人醫療保險、汽車保險、高爾夫球保險、寵物保險.....

Employee Voluntary Benefits are designed as a win-win supplement to an organization's benefit package. Employee can acquire an all-round protection without creating extra financial burden to the company.

Apart from commercial insurance, our extensive scope of personal line insurance products is tailored to best suit the different needs of individual, including: Term Life, Universal Life, Investment-Linked Insurance, Education Fund, Retirement Planning, Lady Insurance, Travel Insurance, Maid Insurance, Home Insurance, Personal Accident Insurance, Individual Medical Insurance, Motor Insurance, Golfer Insurance, Pet Insurance...

業務及特別風險保障 Business and Special Risk Protection

保障企業業務免受因主要營運風險而產生的財務損失，全面助您以鞏固業務，大展鴻圖。

Protecting your business against financial losses that may result from major operating risks, so as to ensure business growth and continuity.

▶ 要員保險保障	Key Man Insurance	▶ 商業犯罪保險	Commercial Crime or Fidelity Insurance
▶ 火險	Fire Insurance	▶ 董事責任保險	Directors & Officers (D&O) Liability Insurance
▶ 商業汽車保險	Commercial Motor Insurance	▶ 綁架贖金保險	Kidnap, Ransom and Extortion (K&R) Insurance
▶ 辦公室保險	Office Insurance	▶ 專業失誤保險	Malpractice Insurance
▶ 商舖保險	Shop Insurance	▶ 按揭彌償保險	Mortgage Indemnity Insurance
▶ 船殼險	Marine Hull and Machinery	▶ 專業責任保險	Professional Indemnity (PI)
▶ 貨運保險	Marine Cargo	▶ 產品責任保險	Product Liability
▶ 各種海事責任保險	Marine Liability	▶ 工程保險.....	Contractor All Risk...
▶ 犯罪保險	Crime Insurance		

