



# 香港專業保險經紀協會

## PROFESSIONAL INSURANCE BROKERS ASSOCIATION

Ref. No. : MEMO/185/2021  
To : All Members  
From : Simon Kwan - Chairman  
Date : 7 April 2021

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Dear Members,

**Re: Revamped PIBA Financial Needs Analysis Form (“FNA” Form) with a Fillable Version**

We are pleased to inform all members that, having adopted opinions from members, a broker company FNA is now provided in both fillable and print version.

The revamped PIBA FNA version PIBA-FNA-2020-001, both fillable and printable, are now enclosed herewith. Members should read carefully to the Remarks of this letter before using this FNA.

Best Regards,

Simon Kwan  
Chairman

Encls.

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Remarks:

1. Members have the primary duty to ensure that the FNA form you use would be accepted by relevant insurers.
2. Members should follow strictly all the requirements as stipulated in GL30 when conducting FNA for customers and pay attention to the validity period of FNA Form.
3. PIBA shall not be responsible for any liabilities derived from the usage of the Form.
4. Members shall not make any modifications to the Form (including all preset questions, layout and customer declaration), and PIBA shall not be responsible for any consequences derived from the change of the form made by members.