



香港專業保險經紀協會  
PROFESSIONAL INSURANCE BROKERS ASSOCIATION

Ref. No. : MEMO/053/2007  
Date : 27<sup>th</sup> April 2007  
To : All Chief Executives  
From : Raymond Yam – Chairman of Special Working Group  
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Dear Sir/Madam,

Re: Survey on difficulties relating to transfer of service to brokers in long term and long term (including linked) business

Some members reflected to the Association that they have encountering difficulties, or even rejected by insurance companies when request for transfer of service from agent to broker under the authorization of the respective client.

The Executive Committee of the Association considers that this phenomenon may affect the role of insurance brokers since insurance brokers have the duties to work for the best client's interest. As such, a working group was set up to conduct a survey on this issue and I was appointed as the Chairman of it.

If your good company and/or your technical representatives come across similar experience, kindly complete the attached questionnaire and return it to the Secretariat **on or before 10<sup>th</sup> May 2007**. Depending on the response from members, the working group will judge the impact of this issue to our members and decide the further action to be taken.

Please be informed that all information collected will only be used for this survey and be kept in strict confidence.

Thank you for your attention in this matter.

Regards,

(for) Raymond Yam  
Chairman of Special Working Group

Encl.

RY/gc

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