

The Opportunities and Challenges of Wealth Management Connect



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8 Jul 2022 (Fri) | 7:00pm – 10:00pm



Objective

Upon completion of the course, participants will be able to get the latest insights on the Cross-boundary Wealth Management Connect (WMC) in the Greater Bay Area (GBA), which was introduced by the People's Bank of China and the HKMA, to support the GBA development and closer financial cooperation between their jurisdictions. Today, with ongoing challenges from the pandemic and geopolitics, technology and innovation are top priorities in accelerating the transformation of the GBA into a world-class bay area.

In this course, we will share the knowledge of the GBA customers' needs and expectations, and risk tolerance of a wider investors base. Learn about product diversification in terms of product design, service quality as well as risk management.

Target Audience

01

Banking Practitioners

Current Relationship managers, Product Managers dealing with corporate and individual clients. It is also suitable to the entry-level practitioners in any banking function.

02

Key Finance Members

Banking practitioner who is seeking to build and enhance your organisation's resilience to respond to new challenges in the GBA area.

SPEAKER

Key Description

The speaker holds a MBA degree and a bachelor degree, as well as relevant banking professional qualifications. He had been working in the bank field for more than 20 years.

Over the past years, he had rich of working exposures in various banking business such as wealth management, branches administration (including the branch in Mainland), credit risk management and risk management of financial institutions.

Programme Outline

Investment Preferences of Mainland and Hong Kong High-Net-Worth Individuals

Various ways of financial investment channels into (and out of) Mainland China

The Greater Bay Area (GBA) and the "Cross-Border Wealth Management"

- Background of the Policies
- "Cross-Border Wealth Management" policy implications and the development direction of Hong Kong's wealth management industry
- Business potential
- Analysis of the GBA banking industry
- Regulatory landscapes for investment products

What are the risk factors involved of the cross-border investment products

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Scan the QR code at the upper right-hand corner or [click here](#) to apply via e-form

Programme Delivery

Virtual Classroom (Zoom)
Cantonese

Early Bird DEADLINE

24 Jun 2022 (Fri)

Enquiries

(852) 2153 7800

programme@hkib.org

Application DEADLINE

1 Jul 2022 (Fri)

PRICE LIST

Early Bird

Regular Price

Individual member

HKD 900

HKD 990

Staff Corporate Member

HKD 1,080

HKD1,190

Non-member

HKD 1,200

HKD1,320