

Navigating FinTech and Family Offices: Insights for Financial Professionals

Programme Code: HGFT00P25061

10 June 2025 (Tuesday)
12:00nn – 2:00pm



HKIB ECF SFC
CPD CPD CPT

Programme Outline

- Key Developments in the FinTech Ecosystem**
 - Pioneering Segments: Overview on Artificial Intelligence (A.I.) and other trailblazing technologies.
 - Capital and Growth: Insights into funding trends shaping the landscape.
 - Entrepreneurial Visionaries: Driving FinTech innovation
 - Collaborative Change: Interactions among key stakeholders, regulators, consumers, entrepreneurs.
- Family Offices: Evolution and Influence**
 - Diverse Structures: Unveiling the various types of Family Offices. Investment Preferences: Delving into their evolving priorities in the FinTech realm
 - Deal Dynamics: Criteria that guide their selection of FinTech opportunities
- The Intersection of FinTech and Family Offices: A Playbook for Financial Professionals**
 - Opportunities for Financial Institutions: Strategic benefits of FinTech-Family Office collaborations
 - Nexus Mastery: Essential expertise for effective harnessing.
 - Future Trends: Watch innovations in FinTech-Family Office synergy.

Speaker Introduction

The speaker brings 30 years of experience in the Asset and Wealth Management industry, working in New York, Vancouver, and Hong Kong. He has worked with renowned firms like BlackRock, Goldman Sachs, Barings and Value Partners. His expertise included AM arm of Swiss, private bank experience at UBP, advisory roles with the United Nations and Forbes, active committee and board role participations in industry associations, and a strong educational background. He has also lectured at prestigious universities and spoken at major conferences.



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(852) 2153 7800
programme@hkib.org
<https://www.hkib.org/page/121>

Target Audience

- Banking Practitioners;
- Professionals working in the technology, entrepreneurs, Financial Professionals;
- Financial Institutions, Wealth Managers, Investment Advisors, and other entities;
- HKIB Professional Qualification Holders :



Programme Delivery

Virtual Classroom (Zoom)
Cantonese

Application DEADLINE

3 June 2025 (Tuesday)

**PRICE
LIST**

Price

Individual
Member
HKD

HKD660

Staff of
Corporate
Member
HKD

HKD800

Non-
Member
HKD

HKD880