

# Great Bay Area Customer Demand Insights: Matching Cities with Financial Solutions

Programme Code: HGGB00P25111

**19 November 2025 (Wednesday)**  
**11:00am – 2:00pm**

**3 HOURS**  
HKIB ECF SFC  
CPD CPD CPT

## Programme Outline

- Introduction to the Greater Bay Area economic landscape and city-specific industry profiles
- Analysis of customer segments and demand drivers unique to each Greater Bay Area city
- Aligning financial service products with local industry characteristics and client needs
- Developing tailored wealth management strategies based on risk profiles and market trends
- Case studies demonstrating successful financial solutions customized for Shenzhen, Hong Kong, Guangzhou, and other Greater Bay Area cities

## Speaker Introduction

The speaker has 18+ years of experience in the financial compliance industry across global family offices, private banking, commercial banking, and insurance. She is currently Chief Compliance Officer at a Canadian-based Global Family Office, leading complex cross-border compliance strategies and overseeing digital assets. She previously held senior compliance roles at UBS AG and Huatai Financial Holdings. Appointed to the Hong Kong–Shenzhen Financial Cooperation Committee, she contributes to financial regulatory development. She also served as a board member of the Fintech Association of Hong Kong and lectures widely on compliance, fintech, and digital finance.

## Target Audiences

1. Banking Practitioners Covering Cross Boundary Regional Businesses;
2. Wealth Managers, Relationship Manager and Financial Analysts;
3. HKIB Professional Qualification Holders :



## Programme Delivery

Virtual Classroom (Zoom)  
Cantonese

## Application DEADLINE

12 November 2025 (Wednesday)



**APPLY NOW!**

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<https://hkib.org/page/185>

**PRICE  
LIST**

**Price**

Individual  
Member  
HKD

HKD990

Staff of  
Corporate  
Member  
HKD

HKD1,200

Non-  
Member  
HKD

HKD1,320