

Technology  
and Data
Soft  
Skills
Banking  
Knowledge

# The Ultimate Guide on Wealth Management for Chinese Mainland Customers in Hong Kong

Programme Code: THRRW00P26091

29 September 2026 (Tuesday)

12:00nn - 2:00pm



HKIB SFC PWMA  
CPD CPT OPT

## Programme Outline

This training programme aims to provide an ultimate, comprehensive, all-in-one guide for professionals serving the Chinese Mainland customer segment in wealth management sector.

- Overview of the wealth management sector in HK
- Recent trends and growth of high-net-worth individuals from the Chinese Mainland
- SWOT analysis of the prevailing strengths and weaknesses, opportunities and threats
- Key propositions for this customer segment
- Highlights on cross-boundary products and services between the Chinese Mainland and HK, including the 5 Cross-Boundary Connects covering account opening, wealth management, mortgages, payments and customer services
- Common limitations for the Chinese Mainland customers on other products' application, such as credit card, loans, or investment
- 7 key differences between Chinese Mainland customers and Local customers
- Conclusion and key takeaways

## Speaker Introduction

The speaker is a seasoned banking executive with extensive leadership experience across Hong Kong and Greater China. Formerly Head of Retail Banking and Wealth Management and board-level positions at leading international and regional banks, she possesses deep expertise in retail banking and wealth management. She has received the "Global Emerging Leader" and "Global Honorary Employee" awards. She has served as on the Banking Industry Training Advisory Committee under the HKSAR Education Bureau and she is also a trainer for leading universities in Hong Kong, including HKU Business School.

## Target Audiences

1. Banking Practitioners
2. Retail Banking Department Heads, Wealth Management Relationship Managers, Product Managers, Compliance and Risk Management Managers, and Branch Managers
3. HKIB Professional Qualification Holders (eligible for CPD Core Hours):

CCOP(GC) CCOP(IIC) ACOP CORP AORP ACsP

CCRP(CL) CCRP(CPM) ACRP CRWP ARWP

CPFinT(M) CPFinT(S-AIBD) CPFinT(S-DLI) CPFinT(S-OBAP) CPFinT(S-RT) CPFinT(A)



## Programme Delivery

Virtual Classroom (Zoom)  
Cantonese



## Application DEADLINE

22 September 2026 (Tuesday)



## APPLY NOW!

Enquiry : (852) 2153 7800  
[cs@hkib.org](mailto:cs@hkib.org)  
<https://hkib.org/page/284>

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|------------|-----------------------|-------------------------------|----------------|
| Price      | HKD660                | HKD800                        | HKD880         |