CO-ORGANIZER

澳門金融學會 MACAU INSTITUTE OF FINANCIAL SERVICES

Dr. Charm & Company

Global FinTech Innovation and Industry Best Practices Training Program

for Macau

This Program aims to explore 4 key questions with the participants, prepare and empower participants to take on the FinTech wave and seize the opportunities in the Greater Bay, South East Asia and key markets globally.

1. What does the **latest development of FinTech worldwide** mean to financial services incumbents, start-ups, investors, regulators, governments, universities and students in the Greater Bay Area especially Macau?

2. How to get the most out of this inevitable **revolution to the financial services** industry, especially in the Greater Bay Area and the SE Asia markets?

3. How to **innovate new business models for financial services** with emerging technologies such as, AI, Big Data, Blockchain, Cryptography, API, IoT and AR/VR?

4. What is the implication of the latest development of FinTech worldwide to Macau's **"Specialised Financial Services" strategy**?

10 KEY MODULES

Global FinTech Trends & Ecosystem; Payment & Remittance; WealthTech & Robo-Advisory; Lending & Alternate Financing; Virtual Banking & Open Banking; AI, Machine Learning & Big Data; InsurTech; Blockchain & Cryptocurrency ; RegTech, Compliance, Data Privacy & Cybersecurity; FinTech Intrapreneurship & Corporate Innovation

PROGRAM OBJECTIVE

Global FinTech Innovation and Industry Best Practices Program is designed to empower participants with practical fintech knowledge, including the latest business models, technologies, innovative mindset and culture, to take up the FinTech wave and seize the opportunities in the world.

The course will explore the following

KEY TOPICS with the participants:

1. Core FinTech Concepts and Technologies
2. Innovative Business Models of FinTech Unicorns
3. FinTech Strategies of Financial Services Incumbents
4. Values of Fintech Ecosystem to Financial Institutions and FinTech Start-ups
5. FinTech Intrapreneurship and Corporate Innovation Management
6. Future Trend and Development of Fintech

TARGET PARTICIPANTS

1. Management and executives in financial services companies
2. Management and executives in innovation and technology companies
3. Management and executives in FinTech and Tech start-ups
4. Government officials, regulators and policy makers
5. Academia, researchers and university students

Remarks: No pre-requisite is required

ASSESSMENT AND CERTIFICATION

Certification will be issued by Macau Institute of Financial Services to those participants who have successfully met all the following criteria:

1. Completed no less than 8 modules of the program;
2. Obtained a Grade C or above on the assessment test of each participated module;
3. Completed the final project of the program and obtained a Grade C or above.

LANGUAGE OF TRAINING DELIVERY

The class will be delivered in Cantonese and Putonghua. The training materials are primarily in English.

DATE AND TIME

The program contains 10 half-day modules and is conducted in 5 days: **August 22, 29; September 5, 12 & October 3, 2020**

VENUE

Macau Institute of Financial Services

PROGRAM FEE

15,000 MOP per student

REGISTRATION AND ENQUIRY

Macau Institute of Financial Services
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KEY TRAINERS

DR. TOA CHARM

- Associate Professor, CUHK Business School
- Chairman of Dr. Charm & Co. and OpenCertHub
- Former Chief Public Mission Officer, Cyberport Hong Kong
- Former Executive: HSBC, IBM, Oracle and Jardine Pacific
- Chief Judge, 2020 & 2019 HK ICT Awards – FinTech
- FinTech Advisory Panel, Hong Kong Institute of Bankers

DR. WING CHEUNG

- CEO and Chief Science Officer (CSO), Lattice
- Former Head of Portfolio Analytics at Lehman Brothers
- Former Head of Portfolio Analytics at Nomura (London)
- PHD, Cambridge University, UK

DR. DAVID MA

- Co-founder and Chief Risk Officer, RTL Limited
- Co-Founder & Advisor of Elite FinTech Startups in China
- Former Head of Data Science, AIG, AIA, Citi Group and Bank of America
- PHD, Yale University, USA

MR. MICHAEL LEUNG

- Group CEO, BOA Financial Group
- The Medal of Honour, Hong Kong SAR Government
- Former CIO and COO, China CITIC Bank International
- Former Deputy Chief Executive, China Construction Bank (Asia)
- Doctor of Business Administration (candidate, CityU)

MR. ALVIN KWOCK

- Founder & CEO, OneDegree
- Head of Research, Asia-Pacific Head of Emerging Technology and Taiwan JP Morgan
- MA degree in Social Science and a BA degree in Economics, the University of Chicago

MR. JACOB WAI

- Founder & Managing Director, Toppix Holdings
- Former CDO and CRO, MoneySQ
- Former Executives of China CITIC Bank International, UBS AG and HSBC
- Doctor of BA (candidate, University of Wales Trinity Saint David)

DR. DUNCAN WONG

- Founder and CEO, CryptoBLK
- Former VP, Applied Science and Technology Research Institute (ASTRI)
- PHD, Northeastern University, US

MR. KEN LO

- Founding Member, ZhongAn International
- Former Consultant, Mckinsey and E&Y
- Former Management Trainee, HSBC
- Master of Finance, Hong Kong University of Science & Technology

MR. EMIL CHAN

- Chairman, Smart City Consortium Fintech Committee
- Founder and Hon. Chairman, StartHK
- Former Executive, Credit Suisse and BayernLB
- MBA, University of Northern Iowa