

BEIJING-HONG KONG FINTECH CONNECT SUMMIT: FINTECH AND THE FUTURE OF FINANCIAL SERVICES

EVENT DETAILS

Format The event is jointly sponsored by CFA Institute, CFA Beijing and HKSFA. Speakers will be speaking from Beijing 9 – 11 am and Hong Kong 11 am – 1 pm. Delegates joining at one of the 8 locations hosted by CFA societies will have priority in submitting questions to the speakers on site or remotely.

Time 25th March, 2017 (Sat)

Hosted by CFA Institute, CFA China (Beijing), The Hong Kong Society of Financial Analysts

Co-Hosted by CFA China (Chengdu, Hangzhou, Shanghai, Shenzhen), CFA Thailand Society, CFA Indonesia Society

	Time	Live Event	Broadcasting to
Format	09:00 – 11:00	Beijing	Hong Kong and other societies
	11:00 – 13:00	Hong Kong	Beijing and other societies

Target Attendees • 200 pax or above each for Beijing and Hong Kong

- **The first FinTech event hosted in Beijing and Hong Kong simultaneously**
- **Featuring top leaders from key stakeholders shaping the industry's future**

FinTech is coming! There's much talk about disruption these days in the press and at FinTech events. For example, a widely-reported statistic is that Goldman Sachs has replaced 600 of its traders with 200 computer engineers. Is your job at risk? Are there new skills that you need to develop to excel?

The best way to tell how much of this is hype and how much of this will become reality is to listen to the real leaders from all the key stakeholders who will collectively shape the future of financial services. Therefore, we have invited an all-star cast of industry leaders to share their insights with you: financial institutions, technology innovators, regulators, VC investors, and consulting firms are all represented.

China has been named one of the world's largest FinTech hubs by EY. This has been one of the rare occasions that the world is looking to China and more broadly Asia for directions of the industry's future. At this event, you'll also hear live from industry leaders in Beijing about the latest development in China, be it how blockchain may transform our business or impact tech giants such as Alibaba and Tencent have had on the payment business.

PROGRAM

Time	Agenda	Speakers
<i>Beijing Session 9 – 11 am</i>		
09:00	Opening remarks	David Xie, President, CFA Beijing LJ Jia, Country Head, China, CFA Institute
09:10	Opening Keynote	Regulating FinTech and Promoting a Healthy Financial Services Industry Li Wei, Director, Science and Technology, People's Bank of China
09:25	Keynote address	Can China and Asia Lead in FinTech Globally? Greg Gibb, CEO and Chairman of Lufax
09:40	Keynote address	Will Blockchain Transform Financial Services? (Invited)
09:55	Panel discussion	Where Will FinTech Make the Most Inroads in China? <ul style="list-style-type: none"> • Guo Yuhang, Dianrong.com CEO • Liu Zhen, Founder & CEO of Clipper Advisor • Mobile Payment expert, AntFinancial • Xi Hui, Deputy Director & Senior Economist at Financial Information and Technology Institute (FITI) Moderated by: Larry Cao, Content Director, CFA Institute
10:45	Closing Keynote	FinTech Setting Off Waves of Digital Wealth Management Tang Ning, CEO, CreditEase
<i>Hong Kong Session 11 am – 1 pm</i>		
11:00	Opening remarks	Representative of HKSFSA
11:05	Opening Keynote	FinTech and the Future of Financial Services Nick Pollard, Managing Director, APAC, CFA Institute
11:20	Keynote address	Regulating FinTech and Promoting a Healthy Financial Services Industry Bénédicte N. Nolens, Senior Director, Head of Risk and Strategy, Hong Kong Securities and Futures Commission
11:40	Keynote address	FinTech Trends in Asia James McKeogh, AP FinTech Lead Partner, KPMG
12:00	Keynote address	Innovating from within: Financial Institutions' Road Map for Change (Invited)
12:20	Panel discussion	Where Will FinTech Make the Most Inroads in Asia? <ul style="list-style-type: none"> • David Piesse, Chief Risk Officer, GuardTime • Janos Barberis, Founder, SuperCharger • Li Ting, CFA, YF Financial CEO Moderated by

SPEAKERS

Bénédicte N. Nolens
Senior Director and Head of
Risk and Strategy
Hong Kong Securities and
Futures Commission (SFC)



Greg Gibb
CEO and Chairman
Lufax



Guo Yuhang
Founder and CEO
Dianrong.com



James McKeogh
AP FinTech Lead Partner
KPMG



Janos Barberis
Founder and CEO
SuperCharger



Larry Cao, CFA
Content Director CFA
Institute



Li Ting, CFA
CEO
YF Financial

**Li Wei, Director, Science and
Technology, People's Bank
of China**



Liu Zhen
Founder and CEO
Clipper Advisor



Nick Pollard
Managing Director
APAC, CFA Institute



Tang Ning
CEO
CreditEase



**Xi Hui, Deputy Director &
Senior Economist at
Financial Information and
Technology Institute (FITI)**

PROJECT BACKGROUND

FinTech has taken the financial services industry by storm.

Many members and other industry professionals are at least somewhat concerned about how fintech will affect their employers and their own career prospects. With the goal of bringing more clarity to this fundamental question that is of great importance to them, we launched the Beijing Hong Kong FinTech Connect initiative in fall 2016.

The objective led us to focus on areas where innovations are likely to “disintermediate” or are disruptive to financial institutions, including Blockchain, robo advisor, mobile payment and P2P (peer-to-peer) lending. For the same reason, we have also intentionally left out, to a large extent, some popular fintech topics such as artificial intelligence, big data, and cyber security.

There’s no lack of information or events being created on these topics. What do we bring to the table? As a global membership organization of investment management professionals, our network in the industry around the world is unparalleled. We can add value to the ongoing discussion by facilitating a balanced discussion between all the major stakeholders, including financial institutions, technology innovators including large tech companies and fintech start-ups, regulators, investors, and research firms. It is their collective actions rather than the action of any individual group that will determine the industry’s future. We can also help connect the discussions in China and Hong Kong/rest of the world.

As part of the Beijing-Hong Kong FinTech Connect series, we have organized three CE events since November 2016: “The Future of Investment Advisory” in Beijing; “Understanding Blockchain” in Shanghai and “Will the Internet Giants Dominate Mobile Payment?” in Shenzhen. Each event was well-attended and two of the events included live webcasts. We also published a booklet on “Understanding Internet Finance” in Chinese, which was distributed widely by CFA Beijing, Shanghai, Shenzhen and Taiwan. The articles included in the booklet were written by our staff and CFA charter holders on the above topics. They were very popular in both Chinese and English social media channels and have also generated interest in the press.

On 25 March, CFA Beijing and HKSFA will cohost the event with us in Beijing (9- 11 am) and Hong Kong (11 am – 1 pm), respectively. The entire 4-hour session will be broadcast live to other CFA societies in the region. We will also distribute the second Chinese booklet and the English booklet to participants on event sites and online. A Research Briefing by Research Foundation is also being planned.

We hope you find the content and events insightful. As always, we welcome your feedback. Please feel free to reach out to us via wechat (barcode) or email fintech.apac@cfainstitute.org.