



AI-Powered Wealth Management: Turning Complexity into Clarity

Programme Code: HGFT00P25031

4 March 2025 (Tuesday)
12:00nn – 2:00pm

2 HOURS

HKIB ECF SFC
CPD CPD CPT

Programme Outline

Explore how AI revolutionises wealth management, turning complex data into actionable insights. Learn to provide personalised advice, enhance client engagement, and promote financial inclusion in today's dynamic financial landscape.

▪ **Simplifying Complexity:**

Learn how AI turns vast financial data into actionable insights with examples like real-time portfolio monitoring, personalised investment research, and predictive analytics for market trends.

▪ **Enhancing Professional Expertise:**

Discover how AI automates routine tasks like portfolio rebalancing and data visualisation, freeing advisors to focus on strategic planning and deepening client relationships.

▪ **Trust & Transparency:**

Explore how AI fosters trust through transparent, auditable, and explainable decision-making processes. Learn how professionals can ensure the accuracy, reliability, and ethical use of AI in wealth management.

▪ **Global AI Trends in Finance:**

Gain insights into how both established financial institutions and fintech startups are leveraging AI to optimise client engagement, manage risks, and foster innovation.

Speaker Introduction

The two speakers combine 30+ years of experience in finance, tech, entrepreneurship, and investment. One led tech teams at DBS and Singlife, driving regional growth and innovation. The other held leadership roles at Google, EY, and Citibank, focusing on digital transformation in finance. Together, they use AI and tech to empower individuals and organisations in financial navigation.



APPLY NOW!

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Target Audiences

1. Banking Practitioners
2. Compliance and IT Professionals
3. HKIB Professional Qualification

Holders :



Programme Delivery

Virtual Classroom (Zoom)
Mandarin

Application DEADLINE

25 February 2025 (Tuesday)

PRICE LIST	Individual Member	Staff of Corporate Member	Non-Member
	HKD	HKD	HKD
Price	HKD660	HKD800	HKD880