

# [Banking AI Series] Wealth Management 3.0: Unlocking New Opportunities in AI-Driven Green Investment and Digital Assets

Programme Code: HGGB00P25041

29 April 2025 (Tuesday)

12:00nn – 2:00pm



HKIB ECF SFC  
CPD CPD CPT

## Programme Outline

1. Introduction to Wealth Management 3.0 – Explore how AI, ESG, digital assets, and quantum computing are transforming modern finance, with a special focus on their impact within the Greater Bay Area (GBA) financial ecosystem.
2. AI in Portfolio & Green Investments – Discover how AI enhances risk assessment, asset allocation, and sustainable investment strategies, aligning with GBA's green finance initiatives and regional ESG policies.
3. Digital Assets & Tokenization – Understand the benefits of security tokens, CBDCs, and fractional ownership in wealth management, with insights into Hong Kong's leadership in digital asset regulation and GBA's role in digital finance innovation.
4. Investment Strategies & Risk Management – Learn how AI-powered strategies optimize crypto portfolios, DeFi investments, and risk mitigation, with a focus on cross-border financial collaboration within GBA.
5. Future Trends & Opportunities – Discuss the impact of quantum computing, AI innovations, and regulatory developments on the financial industry, emphasizing how GBA is positioning itself as an Asia-Pacific fintech and AI-driven financial hub.

## Speaker Introduction

The speaker is a seasoned compliance professional with 17 years of experience in financial sectors, including expertise navigating the complex regulatory landscapes. She excels in regulatory compliance, wealth management, and fintech, with a specialised focus on issues pertaining to China's global infrastructure development. She is a renowned speaker, lecturer, and influencer in the industry, recognised for her deep knowledge of Regtech and its implications for the evolving GBA financial ecosystem.

## Target Audiences

1. Banking Practitioners
2. Compliance officer, Wealth Management Professionals and Risk Management Specialists
3. HKIB Professional Qualification Holders :



## Programme Delivery

Virtual Classroom (Zoom)  
Cantonese

## Application DEADLINE

22 April 2025 (Tuesday)



**[APPLY NOW!](#)**

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LIST**

Price

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HKD

HKD660

Staff of  
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HKD880