

上海浦东国际金融学会

邀请函—2019 中国财富管理创新国际峰会

Invitation Letter—China Wealth Management Innovation Summit

热烈祝贺 2019 中国财富管理创新国际峰会隆重召开！

Congratulations to the grand opening of China Wealth Management Innovation Summit!

回首过去十年，在高净值客群财富加速积累的驱动下，包括私人银行在内的财富管理行业在中国得到了长足的发展。国内外的银行，券商、信托、基金、第三方财富管理公司及互联网金融公司纷纷涌入中国市场，极大的推动了国内财富管理市场的转型与发展。与此同时，中国财富管理市场也正面临着诸多不容忽视的挑战。行业政策推陈出新，产品和服务不断创新，组织结构和制度不断变化，都对传统的业务模式和组织架构提出了严峻的考验。一方面，人民财富的加速积累和财富管理意识的苏醒无疑极大的促进了财富管理行业的发展；另一方面，CRS 信息交换，资管新规等行业政策法规的推出，对财富管理行业和机构提出了新的要求。当前，金融机构普遍面临产品同质化严重，业务响应延迟，组织结构落后等问题。未来，财富管理行业将更加关注业务转型，通过对客户进一步细化分层，提高投资研究和资管水准，增强财富管理综合服务能力。能否适应变化并及时做出调整将成为财富管理机构是否能在激烈的市场竞争中立足的关键。

Over the past decade, driven by the accelerated accumulation of wealth of high-net-worth customers, the wealth management industry, including private banks, has made great strides in China. Banks, securities companies, trust companies, fund companies, third-party wealth management companies and Internet finance companies have flooded into the Chinese market, which greatly promotes the transformation and development of the domestic wealth management market. Meanwhile, the Chinese wealth management market is also facing many challenges that cannot be ignored. Industry policies are changing, products and services are constantly innovating, organizational structures and systems are constantly changing, and they all put forward severe challenges to traditional business models and organizational structures. On the one hand, the accelerated accumulation of people's wealth and the awakening of wealth management awareness have greatly promoted the development of the wealth management industry. On the other hand, the introduction of CRS information exchange, new industry policies and regulations issue, all of these put new demands on wealth management agencies. At present,

financial institutions generally face problems such as serious product homogeneity, delayed business response, and poor organizational structure. In the future, the wealth management industry will pay more attention to business transformation. Through further stratification of customers, improve investment research and asset management standards, and enhance the comprehensive service capabilities of wealth management. Being able to adapt to change and make timely adjustments will be the key to whether wealth management institutions can stand in the fierce market competition.

在此背景下,由上海泽为资讯集团联合上海浦东国际金融学会筹办的“2019 中国财富管理创新国际峰会”将于 5 月 23 至 24 日在北京隆重召开。本次会议聚焦国内外财富管理行业的最新市场动态,行业发展趋势,产品服务创新,组织结构变革等方面的最新进展,分享最前沿的金融科技应用,探讨和发掘新形势下财富管理行业的发展机遇。本次会议邀请当前财富管理领域中顶尖的国内外私行,券商,信托,保险,基金,第三方财富管理公司,家族办公室,咨询公司等机构的决策者和专家,通过主题演讲和圆桌讨论等形式,集中讨论行业热点话题,探求应对挑战之道。以期通过本次峰会,促进我国财富管理行业健康向善发展。

Under this context, the "2019 China Wealth Management Innovation International Summit" hosted by SPIF and Front Financial Research Institute (a subsidiary of SZ&W Group) will be held in Beijing from May 9th to 10th. The conference focused on the latest market trends in the wealth management industry at home and abroad, the latest developments in industry development trends, product service innovation, organizational structure changes, sharing the most cutting-edge financial technology applications, and exploring and exploring the development of the wealth management industry under the new situation. opportunity. We invited many decision makers and experts from the domestic and international private banks, brokers, trusts, insurance, funds, third-party wealth management companies, family offices, consulting companies, etc. in the field of wealth management, through keynote speeches and roundtable discussion form, focus on hot topics in the industry, and explore ways to deal with challenges. We hope this event could promote the healthy development of China's wealth management industry through this summit.

我们诚挚地邀请您参加此次 5 月 23 日至 24 日在北京举办的行业盛会! 预祝 2019 中国财富管理创新国际峰会取得圆满成功!

We sincerely welcome you to participate in this grand event which will be held in Shanghai from May 23 to 24. And we wish the China Wealth Management Innovation Summit a great success!



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Shanghai Pudong International Finance Institute