

2025 年

銀行業核心人才培訓計畫國際課程

International Advanced Banking Training Program



2025 年銀行業核心人才培訓計畫國際課程

一、舉辦背景

本系列課程邀請具有豐富國際金融實務及教學經驗之專家擔任講座，依據銀行業核心人才職能發展需要，規劃 **財務金融、企業金融、法令遵循、風險管理、稽核、貿易融資、財富管理、永續金融** 等八大領域課程，透過觀念講授、個案研討及模擬演練等多元化教學方式，強化銀行業人士專業能力，建立新觀念與新技巧。

二、舉辦方式

本計畫 15 門課程將主要採以**實體教學**模式進行，參訓學員需前往課程指定教室與國際講師一同進行課程。各項課程進行細節與相關注意事項，將於各活動課程開課前逕行通知參訓學員。

三、參加對象

- 1.金融監督管理委員會、中央銀行等主管機關人員。
- 2.銀行公會研訓基金提撥機構之從業人員，具 5~8 年金融實務經驗者。

四、參加費用與人數

本系列課程開放前述參加對象**免費參加**，採取機構推薦報名，每機構正取1名、候補人數以3名為限，每門課程上限40人。**分配名額非保證錄取名額**，每門課程名額有限，敬請提早完成報名手續，額滿為止。本院保留統籌分配之權利。

五、報名方式

1. 由機構薦派線上報名
(網址: <https://service.tabf.org.tw/site/talent/Index.aspx>)
2. 本系列課程自 **即日起** 開放線上報名。
3. 每機構僅提供一組報名專用帳號，建請指派專人統籌辦理報名事宜。
4. 線上報名帳號註冊洽詢事宜請洽(02)3365-3666 分機 576、575、573，
或Email：regosd@tabf.org.tw

六、其他事項

1. 本計畫課程主要採**英語授課 (部分講師可以華語問答)**，**不提供口譯**，故**建議派訓人員**除具相關背景或工作經驗外，亦須具備中級或中高級以上英語能力，以達較佳培訓效果。
2. 請學員於課程開始前抵達教室，確實完成報到，依座位表入座，課程中採不定時點名，報到及點名紀錄全勤者課後核發線上證書。於課程結束7個工作日後，請逕至本院官網>客戶服務>教育訓練>受訓紀錄，登入個人帳號密碼下載線上證書。
3. 各課程請務必確認派訓人員可全程配合上課時間再行報名，或是請於開課前三周，替換可配合上課時間之人員參加課程。
4. 缺席課程者，恕不另行提供補課。
5. 請務必填妥報名人員可供聯繫的 **e-mail**，本院將於課前以 e-mail 發送課程通知，請留意是否收到郵件。
6. 本院保留變更本活動內容及講座、講題、時間安排等權利；課程資訊如有異動，將於報名專區網站公告，並以簡訊或 e-mail 通知學員。

2025 年銀行業核心人才培訓計畫國際課程



❖ 感謝院方精心安排的課程，透過老師精闢的講解說明，使我在國際信用狀詐欺案案例研討中有所助益，獲益良多！

❖ 內容說明精闢精彩！

❖ 整體上課是順暢的，這樣的上課方式讓大家有更深的學習！希望你們繼續安排更多課程：)

❖ 2024 年參訓人員心得節錄

財務金融類 (1 門)

日期&時間	時數	課程主題	報名截止日
9/3(三)-9/4(四) 每天 09:00-17:00 (午休約 1 小時)	14	另類投資產品設計與發展策略工作坊	8/20(三)

企業金融類 (1 門)

日期&時間	時數	課程主題	報名截止日
9/9(二)-9/10 (三) 每天 09:00-17:00 (午休約 1 小時)	14	國際聯貸架構設計實務工作坊	8/26(二)

法令遵循類(4 門)

日期&時間	時數	課程主題	報名截止日
*8/12(二) <i>原7/16(三)改期</i> 09:00-17:00 (午休約 1 小時)	7	國際反洗錢最佳實務解析工作坊 ※本課程符合銀行業防制洗錢及打擊資恐在職訓練時數認可7小時	7/29(二)
*8/13(三) <i>原8/12(二)改期</i> 09:00-17:00 (午休約 1 小時)	7	貿易融資洗錢防制實務方法工作坊 ※本課程符合銀行業防制洗錢及打擊資恐在職訓練時數認可7小時	7/30(三)
9/2(二) 09:00-17:00 (午休約 1 小時)	7	數位詐欺與金融犯罪國際趨勢工作坊 ※本課程符合銀行業法令遵循人員在職訓練時數認可7小時	8/19(二)
10/15(三) 09:00-17:00 (午休約1小時)	7	金融業國際制裁風險管理工作坊	10/1(三)

風險管理類 (1 門)

日期&時間	時數	課程主題	報名截止日
10/29(三)-10/30(四) 每天 09:00-17:00 (午休約 1 小時)	14	金融機構資產負債管理新思維工作坊	10/15(三)

稽核類 (1 門)

日期&時間	時數	課程主題	報名截止日
7/30(三) 09:00-17:00 (午休約 1 小時)	7	內部稽核數位化查核科技應用工作坊	7/16(三)

貿易融資類 (2 門)

日期&時間	時數	課程主題	報名截止日
9/17(三)-9/18(四) 每天 09:00-17:00 (午休約 1 小時)	14	國際貿易融資最新發展與實務工作坊	9/3(三)
8/27(三)-8/28(四) 每天09:00-17:00 (午休約1小時)	14	國際商會對信用狀詐欺案例之最新意見解析工作坊	8/13(三)

財富管理類 (2 門)

日期&時間	時數	課程主題	報名截止日
9/23(二)-9/24(三) 每天 09:00-17:00 (午休約 1 小時)	14	國際私人銀行及家族信託實務工作坊	9/9(二)
10/22(三)-10/23(四) 每天09:00-17:00 (午休約1小時)	14	客戶資產管理實務工作坊	10/8(三)

永續金融類(3 門)

日期&時間	時數	課程主題	報名截止日
7/9(三)-7/10(四) 每天 09:00-17:00 (午休約 1 小時)	14	國際永續融資實務工作坊	6/25(三)
8/6(三)-8/7(四) 每天 09:00-17:00 (午休約 1 小時)	14	國際再生能源專案融資案例解析工作坊	7/23(三)
8/20(三)-8/21(四) 每天 09:00-17:00 (午休約 1 小時)	14	ESG氣候調適與社會影響實務工作坊	8/6(三)

財務金融類

參加人員

課程大綱

講師介紹

Mr. Ronald Chung

另類投資產品設計與發展策略工作坊

Advanced Workshop on Designing Alternative Investment Product

9/3(三)-9/4(四) 每天 09:00-17:00

適合具 5~8 年**投資部**、**企業金融**、**企劃** 等實務經驗之銀行從業人員

- Innovation and Design Processes for Financial Products
- Developing Market-Driven Products in Banking
- Customer Segmentation Analysis and Product Pricing Strategies
- Balancing Risk and Return in Banking Products
- Successful Financial Product Design and Marketing Strategies

Mr. Ronald Chung is a seasoned expert in corporate treasury, credit research, and financial product training with over 20 years of international experience across top-tier financial institutions. He has served as the Director of Research at the Credit Research Foundation (USA) and as a Senior Consultant to the Treasury Management Association (now AFP, USA). Ronald has also held senior roles in corporate treasury services and derivative product solutions at Bank of America Merrill Lynch and Citibank in the United States.

Ronald has delivered specialized training in investment markets and capital market products for both entry-level analysts and senior bankers. His training clients include prestigious financial institutions such as Credit Suisse, HKEX, HSBC, Julius Baer, J.P. Morgan, Standard Chartered, and UBS across asset management, private banking, and wealth management divisions. He has also designed and led custom training programs for UBS' s second-generation HNW clients.

企業金融類

參加人員

課程大綱

講師介紹

Mr. Madhav Sivaram

國際聯貸架構設計實務工作坊

Advanced Workshop on Designing International Syndicated Loans Practices

9/9(二)-9/10(三) 每天 09:00-17:00

適合具 5~8 年 企業金融、海外業務、海外分行 等實務經驗之銀行從業人員

- Introduction on International Syndicated Loan-pricing strategy and frameworks
- Documents and Analyzing Borrower's Cost
- Risks in Syndicated Loan and How to Manage the Risks
- Analysis of Default Cases
- Post-loan Management Practices

Madhav has been involved with developing and delivering a range of Technical and Professional Development programmers, with a particular focus on the financial services sector spanning banks, investment organizations and sovereign investor groups. His courses form part of a training curriculum especially designed for positive client outcomes, taking into account regional market needs, and across varying degrees of complexity and participant experiences. His course range include, technical competencies covering financial markets and products, risk management and related analytics. Professional competencies designed for enhancing client relationship management, client needs analysis and solution-oriented sales outcomes. Organizational Effectiveness programmers involving change management, team dynamics and strategic business planning.

法令遵循類

參加人員

課程大綱

講師介紹

Mr. Bassam Azab

國際反洗錢最佳實務解析工作坊

Advanced Workshop on Best Practices in International Anti-Money Laundering Analysis

※本課程符合銀行業防制洗錢及打擊資恐在職訓練時數認可 7 小時

***8/12(二) 09:00-17:00** 原 7/16(三)改期

適合具 5~8 年**法務遵循、防制洗錢、外匯交易、企業金融、海外業務**等實務經驗之銀行從業人員

- Brief Introduction on Latest Money Laundering Trend
- Risk-Based Approach to AML
- Regulatory Landscape and Compliance
- How do Banks Enhance Transaction Monitoring and CDD
- Technology Integration in AML Analysis
- International Best Practices

Mr. Bassam Azab is a highly experienced financial professional with over 20 years of expertise in banking, corporate governance, and consulting across the MENA region and globally. Since 2016, he has led his own financial training and consulting firm, offering advisory and capacity-building services to financial institutions and public sector entities. His previous roles include Regional Head of Business Development, Menafactors Ltd. (2012–2016), Assistant General Manager, Commercial Banking, HSBC (2008–2011), Finance Officer, Corporate Governance, IFC (World Bank Group) (2006–2007), Deputy Senior Manager, Securities Services (1997–2006).

He has also served as a Board Director, Corporate Governance Expert, and held senior positions at both HSBC and IFC, providing him with deep institutional knowledge and leadership experience.

法令遵循類

參加人員

課程大綱

講師介紹 Mr. Robin Lim

貿易融資洗錢防制實務方法工作坊

Advanced Workshop on Anti-Money Laundering Practices in
Trade Financing

※本課程符合銀行業防制洗錢及打擊資恐在職訓練時數認可 7 小時

***8/13(三) 09:00-17:00** 原 8/12(二)改期

適合具 5~8 年**法遵、風險管理、內部控制、內部稽核**等實務
經驗之銀行從業人員

- Update on the International AML regulations in Trade Financing
 - Update on money laundering typologies and countermeasures in Trade Financing
 - Case studies on AML failures in Trade Financing
 - How to identify the UBOs
 - Key points on Sanctions in Trade Financing
-
- 2017-2024: Head of Trade Advisory/Head of Business Development, Asia Pacific, KBC Bank
 - 2020: Adjunct Lecturer in Singapore Institute of Management University
 - 2011-2016: Vice President, Global Transaction Services, Transaction Banking, DBS Bank
 - 2005-2011: First Vice President, Team Lead, Corporate Banking, KBC Bank
 - 2000-2005: Assistant Vice President, Corporate Banking, DBS Bank
 - 1996-2000: Assistant Manager, Corporate Banking, OCBC Bank

法令遵循類

參加人員

課程大綱

講師介紹

Ms. Sonakshi Mushran

數位詐欺與金融犯罪國際趨勢工作坊

Advanced Workshop on Global Trends in Digital Fraud and Financial Crimes

※本課程符合銀行業法令遵循人員在職訓練時數認可 7 小時

9/2(二) 09:00-17:00

適合具 5~8 年 法遵、風險管理、內部控制、內部稽核 等實務經驗之銀行從業人員

- Latest Global Trends in Digital Fraud
- Emerging Trends and Prevention of Financial Crimes
- Regulatory and Compliance Considerations
- Strengthening Internal Response Measures in Banks

Sonakshi is an experienced business analyst and product development professional with a strong background in financial technology and software engineering. With a MBA from Singapore Management University and an engineering degree from Visvesvaraya Technological University, she combines technical expertise with business acumen to drive impactful solutions in financial crime detection and compliance.

Currently, Sonakshi is a Data Scientist at Risikotek Pte Ltd, a fintech startup specializing in data-driven financial crime detection. In her role, she has been instrumental in leading the development of several platforms including an investigation management and data analytics tool. She has also played a key role in market research, stakeholder engagement, wireframing, and defining user journeys. Additionally, she has successfully performed enhanced due diligence and illicit trade investigations for large corporations. She has a deep understanding of money laundering typologies and follow the money investigations.

法令遵循類

金融業國際制裁風險管理工作坊

Advanced Workshop on Risk Management of International Sanctions in the Financial Industry

10/15(三) 09:00-17:00

參加人員

適合具 5~8 年 法遵、風險管理、內部控制、內部稽核 等實務經驗之銀行從業人員

課程大綱

- Latest Case Studies and Trends in International Sanctions
- Identification of Sanction Risks
- Assessment of Sanction Risks
- Control Measures for Sanction Risks

講師介紹

Dr. Mei Pheng Lei

Upon graduating from the University of Malaya with a First Class Honours in 1983, Datin Dr Lee became a fellow and tutor at the Law Faculty, University of Malaya. In 1985, Datin Dr Lee joined the Overseas Chinese Banking Corporation (OCBC) as Head, Legal Department and served as Assistant Vice President in the Malaysia Central Office and subsequently in Kuching Branch, a position she held until she left the bank in 1994 to join Detta Samen & Co., Advocates as a partner. She is currently a senior partner and banking and finance law consultant in Detta Samen & Co Advocates.

風險管理類

參加人員

課程大綱

講師介紹 1

Mr. Steven Claxton

金融機構資產負債管理新思維工作坊

Advanced Workshop on New Perspectives in Asset and Liability Management for Financial Institutions

10/29(三)-10/30 (四) 每天 09:00-17:00

適合具 5~8 年 財務、投資、營運、風險管理 等實務經驗之銀行從業人員

- ALM Framework Overview
- Interest rate risk management strategy and best practices
- Liquidity risk management strategy and best practices
- Behavioral ALM
- Funds Transfer Pricing (FTP)
- ALM in a low-interest rate environment – the impact and strategies
- Integration of Technology and Data Analytics
- The evolution of the balance sheet towards the development of a sustainable value sheet

Mr. Steven Claxton is a seasoned financial consultant and training expert with extensive experience advising financial institutions across the Asia-Pacific and Middle East regions. Over the course of his career, he has held senior roles at global firms including KPMG and Deloitte, specializing in advisory services for banking clients.

From 2010 to 2014 and again from 2015 to 2019, Mr. Claxton served as an Advisory Partner/Director at KPMG, and more recently as a Principal at Deloitte from 2021 to 2022. His core advisory work focuses on integrated balance sheet management in the context of ICAAP (Internal Capital Adequacy Assessment Process), Recovery and Resolution Planning, and stress testing frameworks for both capital and liquidity.

講師介紹 2

Mr. Sky So

Mr. Sky So is the Lead Partner of Financial Services Risk Management, specializing in financial risk management consulting. He also serves as the Banking & Capital Markets Leader in Hong Kong, where he manages a team of over 200 risk professionals. Sky advises APAC financial institutions on enhancing financial risk management practices, integrating financial reporting, risk measurement, and internal controls. He has played a key role in driving solutions and local initiatives related to SFC RA-11 licensing, Basel III reforms, IBOR transition, IRRBB, liquidity risk, fund transfer pricing (FTP), collateral management, and IFRS 9 implementation. His clients include banks, asset managers, insurance companies, regulators, and authorities.

講師介紹 3

Mr. Alvyn Chen

Mr. Alvyn Chen is a senior risk management expert with over 20 years of professional experience in the banking and financial services sector. Since 2010, he has been part of EY Business Advisory Services Inc., specializing in Enterprise Risk Management, where he provides advisory services to financial institutions across Asia. Prior to joining EY, he worked in the Risk Department of Hua Nan Commercial Bank from 2005 to 2010, gaining hands-on experience in bank-level risk operations and regulatory compliance.

Mr. Chen is a frequent speaker at industry conferences and forums, including events hosted by Bloomberg, Reval, AIMA, ISDA, Hong Kong Institute of Bankers, IIF, and EY in both Hong Kong and Taiwan.

講師介紹 4 Ms. Vickie Yu

Ms. Vickie Yu is a seasoned risk management specialist with over a decade of professional experience in the banking and financial services industry. She currently works in Enterprise Risk at EY Business Advisory Services Inc. (since 2015), where she provides advisory services on regulatory compliance, risk governance, and capital management to major financial institutions. Prior to that, she gained valuable industry experience at Chailease Finance Co. Ltd. between 2013 and 2014.

Ms. Yu has delivered a range of training programs for banking professionals across Asia, with a focus on liquidity risk, ALM, IRRBB, AML/CFT, IBOR transition, and Basel-related compliance. Her training audiences have included front-line officers, mid-level managers, and risk and compliance professionals from prominent local and international banks.

稽核類

內部稽核數位化查核科技應用工作坊

Advanced Workshop on Digitalized Internal Audit and
Application of Audit Technology

7/30 (三) 09:00-17:00

參加人員

適合具 5~8 年 **風險管理、內部稽核** 等實務經驗之銀行從業人員

課程大綱

- Introduction to Audit Transformation
- Applications for Digital Tools in Internal Auditing
- Integration of Digital Auditing with Risk Management
- Case Studies on Successful Digital Transformation in Banking
- Future Trends and Challenges in Digital Auditing

講師介紹

**Dr. Sivanesan
Sivakaruniam**

Dr. Sivanesan Sivakaruniam (Dr. Siva) is a leading authority in Governance, Risk Management, Internal Audit, and Compliance, with over 30 years of experience across diverse industries including banking, government, energy, and healthcare in Singapore and the broader Asia-Pacific region. A Certified Internal Auditor (CIA), Certified Information Systems Auditor (CISA), and Certified in Risk and Information Systems Control (CRISC), Dr. Siva combines academic excellence with hands-on leadership in enterprise risk and audit transformation.

He has successfully led internal audit, enterprise risk, and digital transformation initiatives for major organizations such as Singapore Power, Changi General Hospital, Keppel Land, the Ministry of National Development, MOH Holdings, and Cargill Group. In these roles, he spearheaded implementations of risk-based frameworks, conducted investigations into financial fraud and control weaknesses, and curated strategies to digitize audit processes and integrate risk management systems.

貿易融資類

參加人員

課程大綱

講師介紹 蘇志成博士

國際貿易融資最新發展與實務工作坊

Advanced Workshop on Latest Developments and Practices in International Trade Financing

9/17(三)-9/18 (四) 每天 09:00-17:00

適合具 5~8 年**財務、企業金融、投資營運、企劃、風險管理**等實務經驗之銀行從業人員

- Development Trends in International Trade Finance
- Case Studies on International Standard Banking Practices(ISBP)
- Latest Insights from the International Chamber of Commerce (ICC)
- Trade Finance Disputes in Court Decisions Based on ICC Opinions

新加坡貿易融資權威領域專家

經歷：

- 新加坡 DCTrade 顧問公司總裁
- 新加坡大華銀行副總裁及貿易服務總監
- 馬來西亞崇僑銀行副總裁及國際貿易服務及匯兌總監
- ICC 國際商會銀行技術及實務委員會新加坡銀行公會代表
- UCP600 起草委員會成員

貿易融資類

國際商會對信用狀詐欺案例之最新意見 解析工作坊

Advanced Workshop on the Latest Insights into Credit Letter
Fraud Cases by International Chambers of Commerce

8/27(三)-8/28(四) 每天 09:00-17:00

參加人員

適合具 5~8 年財務、企業金融、投資營運、企劃、風險管理
等實務經驗之銀行從業人員

課程大綱

- Overview of Credit Letter Fraud
- Detecting Red Flags
- Legal and Regulatory Landscape
- Best Practices in Fraud Prevention
- Case Studies and Crisis Management

講師介紹 蘇志成博士

新加坡貿易融資權威領域專家

經歷：

- 新加坡 DCTrade 顧問公司總裁
- 新加坡大華銀行副總裁及貿易服務總監
- 馬來西亞崇僑銀行副總裁及國際貿易服務及匯兌總監
- ICC 國際商會銀行技術及實務委員會新加坡銀行公會代表
- UCP600 起草委員會成員

財富管理類

參加人員

課程大綱

講師介紹

Mr. Thomas Chang
Mr. Peter Chen

國際私人銀行及家族信託實務工作坊

Advanced Workshop on International Private Banking and
Family Trust Practices

9/23(二)-9/24 (三) 每天 09:00-17:00

適合具 5~8 年**財富管理、投資、企業金融、海外業務、海外分行** 等實務經驗之銀行從業人員

- Global Trends and Challenges in Private Banking
- Cross-Border Wealth Management Regulations and Tax Planning
- Practical Planning of Family Trust Structures
- Governance Framework and Succession Planning for Family Trusts

To Be Confirmed

財富管理類

參加人員

課程大綱

講師介紹

Mr. John Donato

客戶資產管理實務工作坊

Advanced Workshop on Practices in Client Asset Management

10/22(三)-10/23 (四) 每天 09:00-17:00

適合具 5~8 年**財富管理、投資、企業金融、法遵、風險管理**等實務經驗之銀行從業人員

- Trends and Innovations in Asset Management
- Client Segmentation and Needs Assessment
- Portfolio Optimization and Risk Management
- Strategies for High-Net-Worth Individuals (HNWIs)
- Behavioral Finance in Client Decision-Making
- Technology Integration in Asset Management
- Successful Client Asset Management Strategies

Mr. John Donato is a seasoned expert in capital markets with over 30 years of experience spanning trading, broking, technology management, and financial training. Since 2012, he has served as a Capital Markets Trainer, delivering highly regarded Sales and Trading courses to new hires at leading global financial institutions including Bank of America, JP Morgan, Goldman Sachs, PIMCO, BlackRock, AIG, and others.

From 1996 to 2012, Mr. Donato held senior business analysis and technology management roles at Prebon Yamane and ICAP plc., where he was instrumental in designing trading systems and supporting market infrastructure. Notably, he designed CBB, the first interdealer computer-based broking system for U.S. Treasury securities in 1998.

永續金融類

國際永續融資實務工作坊

Advanced Workshop on International Sustainable Financing Practices

7/9(三)-7/10 (四) 每天 09:00-17:00

參加人員

適合具 5~8 年高階主管、資深主管、企業金融、企劃 等實務經驗之銀行從業人員

課程大綱

- Understanding the SBTs for financial institutions
- How to implement PRB and Equator Principles in banks
- Introduction to Green Asset Ratio
- Introduction to the Capital Requirements Regulation (CRR) and the Capital Requirements Directive (CRD)
- How to read and evaluate a company's ESG reports

講師介紹

Ms. Siu Wei Liew

Ms. Siu Wei Liew is an experienced finance professional and educator with a strong background in banking supervision, auditing, and sustainable finance education.

She began her career as an auditor at BDO Binder (2005–2007), before moving to the Central Bank of Malaysia (Bank Negara Malaysia), where she served as a supervisor in the Financial Conglomerates Supervision Department from 2007 to 2013. She later joined Tunku Abdul Rahman University College as a Finance Lecturer (2014–2022), and currently serves at the Asian Banking School (2022–present). At the Asian Banking School, Ms. Liew designs, develops, and delivers sustainable finance programs. This includes the Sustainable Finance Structured Learning Pathway, a curriculum ranging from foundational to advanced levels, aligned with the Green Finance Advisor (GFA) certification. Her recent work includes collaborating with University Teknologi Malaysia (UTM) on renewable energy policy focus groups and designing green finance training specifically addressing the challenges faced by ASEAN countries.

永續金融類

參加人員

課程大綱

講師介紹
Dr. Stan Ho
(何昊洛博士)

國際再生能源專案融資案例解析工作坊

Advanced Workshop on International Renewable Energy

Project Financing Case Analysis

8/6(三)-8/7 (四) 每天 09:00-17:00

適合具 5~8 年**企業金融、風險管理、金融市場、投資、財務管理**等實務經驗之銀行從業人員

- Common project finance frameworks
- Introduction to solar energy, wind energy (onshore / offshore) financing frameworks and comparison
- Other common financing sources for renewable energy
- Renewable energy financial models and applications
- How to evaluate the credit risk of renewable energy lending

何博士是一位經驗豐富的投資銀行和信用評等專家。在瑞士信貸，美林和貝爾斯登擁有股權資本市場和企業融資部門的投資工作經驗，並且擁有惠譽評級和聯合評級國際信用評級(首席執行官)的工作經驗。

何博士曾從事企業融資和信用評等工作。他在債券和證券化等固定收益領域擁有紮實的產品和市場知識，並在香港和新加坡擁有廣泛而穩固的債務資本市場銀行家、固定收益投資者和信用評級分析師的網絡。

何博士擁有豐富的綠色金融與認證經驗。何博士帶領多家中資發行人在國際資本市場發行綠色及永續債券的評等工作。何博士是商道融綠國際的首席代表。何博士是香港品質保證局 (HKQAA) 綠色金融認證計畫技術委員會成員，也是HKQAA對中國和香港企業及金融機構發行的債券和貸款綠色認證的審核成員之一。何博士是EFFAS認證的ESG分析師 (CESGA®) 考官、及由EFFAS設立的可持續金融研究中心 (SFRH) 的學術總監，負責在亞太地區推廣EFFAS資格。

何博士為香港大學 (HKU) 經管學院客座教授、香港城市大學 (CityU) 商學院特約教授 (EMBA)、香港浸信會大學 (HKBU) 商學院特邀教授、及香港嶺南大學 (LU) 商學院客座教授及經濟系專業實務教授 (MIBF)。同時也是EFFAS認證的ESG分析師 (CESGA®) 和SGS ESG報告分析師。

永續金融類

參加人員

課程大綱

講師介紹 Ms. Judy Su

ESG 氣候調適與社會影響實務工作坊

Advanced Workshop on ESG Climate Adaptation and Social Impact Practices

8/20(三)-8/21(四) 每天 09:00-17:00

適合具 5~8 年**企業金融、金融市場、金融商品、投資、財務、企劃** 等實務經驗之銀行從業人員

- Identifying Climate Risks and Adaptation Strategies in Business Operations
- Integrating ESG Factors into Financial Decision-Making
- Measuring and Communicating Social Impact Effectively
- Utilizing Data Analytics for ESG Reporting and Impact Assessment
- Collaboration Strategies between Corporates and Financial Institutions for Sustainability Goals

Judy has more than 8 years of experience in product and research in commodities and sustainability. She is now responsible for leading the sustainability analytics solutions business at S1, covering the East Asia market. Judy is experienced in managing client projects, delivering insightful results, and helping both corporations and financial institutions on climate and sustainability issues. She has abundant experience in climate risk assessment, carbon accounting and investment portfolio analytics. She also leads the regional thought-leadership initiatives by producing monthly market updates for distribution and speaking at regional industry events.

Judy previously worked at Citigroup as a commodities strategist based in Hong Kong, focusing on investment research in the energy and metals markets and thematic analysis of energy transition and China's carbon market.

