



# Transforming Wealth Management with Robo-Advisors

3 CPD HOURS

Programme Code: P181217VIC

## Course Overview

Technology is transforming the way people live, work & connect. Technology is also transforming the way financial institutions & companies deliver their products & services.

This course allows participants to have a better understanding of these digital advisory services. Furthermore, it provides insights into why investors are leveraging on technology for more efficient & low cost solutions to meet their investment needs.

## Course Outline

- A Fintech disruption or transformation?
- What are Robo-advisors?
- How do Robo-advisors work & design their investment portfolios?
- Who are the key players?
- What are the licensing & regulatory requirements?
- What will be the future challenges?



### **IBF-FTS Funding**

This programme is recognised under the Financial Training Scheme (FTS) and is eligible for FTS claims subject to all eligibility criteria being met. For more information please visit [IBF Website](#).

Please note that in no way does this represent an endorsement of the quality of the training provider and programme. Participants are advised to assess the suitability of the programme and its relevance to participants' business activities or job roles.

The FTS is available to eligible entities based on the prevalent funding eligibility, quantum and caps. FTS claims may only be made for recognised programmes with specified validity period.

## Course Methodology

- Class-based presentation
- Interactive Q&A session

## Who Should Attend

- Individuals from the Finance Industry
- Trading Representatives
- Remisiers

## Speaker's Profile



**Tolmas Wong, CFA** is working currently as Director & Head of Private Clients Services team at CIMB-GK Securities. The team provides research-based advisory services on the regional equity markets & other financial products to corporate, trusts & HNI clients. He started his career at UOB & subsequently became the fund manager of UIS, a listed closed-end fund of UOB group.

He also participated as a volunteer in various professional & academic bodies in S'pore to promote financial education in the industry. He is currently serving as a Board member of CFA Singapore (an affiliate of CFA Institute) & an Executive Committee member at the Asian Securities Analysts Federation (ASAF). He is also lecturing part time for the CFA revision program, SHRI's Diploma for Investment program & various continued education courses in investments for the Institute for Banking & Finance & the Society of Remisiers

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