



Overview

Financial Technology (FinTech) is one of the fastest growing sectors of technology powered innovation. Having seen more than \$60 billion in global investment since 2010, FinTech is redefining several financial sectors. Start-ups as well as established companies are embracing FinTech innovations as the future of the financial services industry.

Who Should Attend?

Financial professionals who would like to accelerate their knowledge of Financial Technology as a first step in leading a digital transformation or launching a new venture.

Course Benefits

BY THE END OF THIS SEMINAR, YOU WILL BE ABLE TO:

- » Describe the history of Financial Technology: where we are today and how we got here.
- » Understand the general FinTech landscape, including digital wealth management, peer-to-peer lending, crowdfunding, blockchain and cryptocurrencies, and Insurance Technology.
- » Understand the application of the technology through in-depth case studies of successful FinTech ventures across each segment.
- » Have a forward-looking view of the adoption challenges, key players, and building blocks by segment.
- » Develop a framework and strategy to build FinTech products and businesses.

PROGRAM LEVEL

Intermediate to Advanced

PREREQUISITES

None

ADVANCED PREPARATION

None



16 CPE
Credits



DELIVERY METHOD
In-person



TIMING
2 Days

Course Agenda

MODULES	TOPICS
<p>1 FinTech Definition and Historical Overview</p>	<p>Financial Technology (FinTech) Defined</p> <p>Historical Industry Development</p> <p>Development of the FinTech Industry in the U.S.</p> <p>Business Segments Within Financial Institutions Impacted by New Technology</p> <p>Regional Comparisons Across the U.S., Europe, and Asia</p>
<p>2 Key Figures</p>	<p>Investment Trends Since 2010</p> <ul style="list-style-type: none"> » By region » By finTech segment <p>Expected Impact of Revenue on Financial Services</p> <p>Global FinTech Projections</p>
<p>3 Catalysts for Change</p>	<p>Demographics</p> <ul style="list-style-type: none"> » Millennials are digitally native » Millennials who will inherit trillions <p>2008 Financial Crisis: Lack of Trust</p> <p>Enabling Technology</p> <ul style="list-style-type: none"> » Mobile development » Artificial intelligence » Financial APIs » Cloud » Cybersecurity, biometrics » Fractional share ownership » New financial instruments
<p>4 Why Does it Matter? Potential Impact</p>	<p>Financial Inclusion for 2 Billion People</p> <p>Revenue Impact</p>

MODULES	TOPICS
<p>5 Overview of FinTech Segments</p>	<p>Current FinTech Landscape</p> <hr/> <p>Introduction to Broader Segments Within the FinTech Industry</p> <hr/> <p>Digital Wealth Management (Robo-Advisors) » Profitability analysis for a 0.25% revenue model » Key differentiators</p> <hr/> <p>Alternative Financing – Peer to Peer (P2P) Lending » Marketplaces vs. lenders » Loan types issued » Revenue drivers</p> <hr/> <p>Alternative Financing — Equity Crowdfunding » Different platform types</p> <hr/> <p>Blockchain and Cryptocurrencies » Different currencies: bitcoin, ripple, ethereum » Smart contracts, blockchain</p> <hr/> <p>Insurance Technology (InsurTech) » Comparison marketplaces, P2P, and usage-based Insurance (UBI) » UBI, telematics, real-time underwriting</p> <hr/> <p>Typical Business Models by Segment » Comparison of old vs. new » Customer journeys » Growth opportunities by finTech segment</p>
<p>6 Case Studies (By Segment)</p>	<p>Wealth Management</p> <hr/> <p>Peer-To-Peer (P2P) Lending » Point of sale credit » Marketplace lending » Mortgages</p> <hr/> <p>Blockchain</p> <hr/> <p>Crowdfunding » Real estate financing » Online VCs</p> <hr/> <p>Insurance Technology</p>
<p>7 Technology Adoption Challenges</p>	<p>Regulatory Compliance</p> <hr/> <p>Trust Factor</p> <hr/> <p>Infrastructure and Middleware Requirements</p> <hr/> <p>Account Opening</p> <hr/> <p>Big Banks, Startups, and Government Lobbying</p> <hr/> <p>New Demographics</p> <hr/> <p>FinTech vs. Social, Mobile, and Local (SoMoLo) boom. What's Unique?</p> <hr/> <p>Internet and Smartphone Access</p>

MODULES	TOPICS
<p>8</p> <p>Notable FinTech Vendors</p> <p>Who's who in finTech: The necessary building blocks</p>	<p>Identity Verification (KYC, AML)</p> <p>Anti-fraud</p> <p>Account Aggregation</p> <p>E-Signature</p> <p>Payment Processing</p> <p>Money Transfers</p> <p>Market Data</p> <p>Real-time Underwriting</p> <p>Credit Scoring</p> <p>Cybersecurity Vendors</p> <p>Custody</p> <p>Compliance</p>
<p>9</p> <p>Getting Started</p> <p>Strategic discussion for various innovation paths</p>	<p>Leading a Digital Transformation</p> <p>Starting a FinTech Venture in 90 days</p> <p>Joining a FinTech Startup</p>

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GROUP DISCOUNTS

Special rates may be available for multiple seminar or group bookings. Please contact us for details.

FEES AND CANCELLATIONS

The fee listed is per participant and includes refreshments, lunches and seminar materials. Seminar fees do not include tax, transportation or hotel accommodations. Payment must be received in full prior to the start of the seminar. Registrations may be canceled in writing via letter or email at least 30 days before the first date of the training for a full refund. Cancellations received less than 30 days in advance are eligible for substitution with another seminar, but fees will not be refunded. We reserve the right to cancel or reschedule seminars at any time. For further information on our refund and complaint policy, please contact us.

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