



全球金融博物馆博览会

Global Financial Museum Expo

Conference
会议手册 Handbook



金融启蒙与普惠金融是全球经济稳定与发展的基石

全球经济一体化与可持续发展的市场成为最近三十年主导世界的价值观，2008 年的经济危机以来全球各国政府与民间的合作更加强化了这一理解。全球经济结构需要改革，美国欧洲长期主导的经济引擎与模式需要与其他国家经济成长的模式达成合作共赢的格局，特别是在金融发展与资本市场上形成的巨大差距需要调整 and 融合。令人鼓舞的是，经过多年的努力，金融启蒙和普惠金融成为各国金融界共识的两个最重要的基石。

金融启蒙 (Financial Literacy) 与传统教育不同，强调了参与者的学习、共享和创新过程。将金融知识从少数专业人员手里，从政府监管者手里，特别从具有垄断性质的金融集团手里解放出来，传播到社会大众，创业者和消费者。让大众理解好的金融体系让我们更安全，更独立，更快乐。人人参与金融活动，培育金融能力，成为现代社会必备的生活常识。这将根本改变金融制度被垄断化和妖魔化以来的社会地位，金融真正成为我们的朋友和提升福祉的交易平台。

普惠金融 (Inclusive Finance) 则以提供金融服务的公平与效率为原则，不断推动现存金融体系的改造，创新各种金融工具和渠道，将社会的金融资源和经济要素资源源源不断地引导到最有效率的中小企业和消费人群，创造公平竞争的机会。普惠金融本质是改革的和进化的，更加关注未来而不是历史。它特别关注既存金融体系外的创新金融市场，特别是互联网金融市场，培育未来的金融创新者。

令人遗憾的是，在各国特别是中国环境中，金融启蒙仍然被局限地理解为监管部门对大众居高临下的风险教育和素质培养。普惠金融仍然被限定在传统金融机构面向中小企业的补贴性支持。面对生机勃勃的 80 后 90 后新一代创业者和消费者，面对洗礼社会的互联网时代的冲击，我们真正需要一次新的呼唤和推动。

中国金融博物馆和中国金融教育发展基金会作为全球金融博物馆协会理事机构，在中国的中央银行支持下，联合主办了首届全球金融博物馆博览会，邀请了近 40 家来自 12 个国家的金融博物馆负责人集聚北京，发布了“金融启蒙北京宣言”，表达共同建立并推动启蒙启蒙和普惠金融国际标准的信心。同时，首届中国金融启蒙与普惠金融年会同时展开，已经运作四年之久的“中国金融启蒙中心”正式成立。超过 10 位部级领导到场，超过 500 位嘉宾莅临，超过千万的微信微博受众给予关注。这是国际金融界和教育界对中国金融界的认可和期待。

作为第二届全球金融博物馆协会的联席主席，我希望能代表中国参与推动金融启蒙国际标准的建立，与 22 个成员国一起合作推动金融启蒙与普惠金融的价值观得到社会的广泛认可，特别是得到未来一代创业者和消费者的支持，成为中国经济发展和全球经济稳定的真正基石。



中国金融博物馆理事长

2015.10.29

Financial Literacy and Inclusive Finance are the Cornerstones of Global Economic Stability and Development

Global economic integration and markets with sustainable development have become the world's main concepts of value of the recent thirty years. Ever since the 2008 economic crisis, the collaborations between each country's government and their civil societies have consolidated this understanding. The global economic structure needs to be reformed. The economic engine and model that have long been dominated by the US and Europe need to form a cooperative and win-win pattern with the economic growth models of other nations. In particular, the huge gap in financial development and capital market needs to be adjusted and integrated. Encouragingly, through many years of effort, Financial Literacy and Inclusive Finance have been considered as the two most important cornerstones by the financial communities of all nations.

Different from traditional education, Financial Literacy stresses on the participants' learning, sharing and innovation process. It aims at liberating financial knowledge from the few professionals, government regulators and especially monopolistic financial groups, and spread it out to the general public, entrepreneurs and consumers. It will enable the public to understand that a better financial system can make us safer, more independent and happier. For each person to participate in financial activities and cultivate financial capabilities has become essential knowledge of life in modern society. This will fundamentally change the social position of monopolized and demonized financial system; enable finance to truly become our friend and a transactional platform that improves welfare.

Inclusive Finance takes equality and efficiency of financial service provision as its principles, constantly pushes forward the transformation of existing financial system, revolutionizes different ranges of financial tools and channels, continuously guides the society's financial resources and economic factors to the most efficient SMEs and consumer groups, and creates opportunities for fair competition. The nature of Inclusive Finance is reformatory and evolutionary, focusing more on the future rather than history. It especially focuses on the innovative financial markets outside the existing financial system, in particular the Internet financial market, with a purpose to cultivate future financial innovators.

It is unfortunate that in many countries, especially China, Financial Literacy is still understood by government regulators as risk education and quality cultivation for the public. Inclusive Finance is still limited to subsidized support from traditional financial institutions to SMEs. In the face of vigorous new generations of entrepreneurs and consumers born in the 1980s and 1990s, and the impact of Internet Age shock on society, we really need a new call and impetus.

With the support from the Central Bank of China, the Chinese Museum of Finance and China Foundation for Development of Financial Education, as the governing bodies of IFFM, have jointly organized the first International Financial Museum Expo, which has invited directors of nearly 40 financial museums from 12 countries to be gathered in Beijing. It has released the "Financial Literacy Beijing Manifesto" and expressed the confidence to jointly establish and launch the international standards for Financial Literacy and Inclusive Finance. At the same time, the first China Financial Literacy and Inclusive Finance Annual Meeting will be held and the "China Financial Literacy Center", which has been operating for four years, will be formally established. More than 10 ministerial officials and over 500 guests will be present and it has attracted over 10 million Wechat and microblog audiences. This is a recognition and expectation from the international financial and education communities on China's financial community.

As the 2nd Co-chairman of the IFFM, I hope to represent China to participate in pushing forward the establishment of international standards for Financial Literacy and work together with 22 member nations to jointly promote the concept of value of Financial Literacy and Inclusive Finance, enable them to be widely recognized by all circles of society. In particular, to win support from the future generations of entrepreneurs and consumers, making Financial Literacy and Inclusive Finance the real cornerstones of China's economic development and global economic stability.



Wei Wang

Chairman of Chinese Museum of Finance

October 29, 2015

全球金融博物馆协会

全球金融博物馆协会是由 22 家各国与金融相关的博物馆联合组建的国际行业协会，2013 年在美国创立。美国金融博物馆担任主席机构，中国金融博物馆是执行理事。协会推动各国金融博物馆的馆际交流与合作，促进展览、学术研究以及金融知识共享，建立金融教育标准与规则。

International Federation of Finance Museums

The International Federation of Finance Museums (IFFM) is an international association founded in 2013 in America by 22 countries and financial-related museums. Chairman of IFFM goes to the Museum of American Finance and Chinese Museum of Finance is the executive director. IFFM aims to promote cooperation among financial museums, to encourage more exhibitions, academic researches and financial knowledge sharing, and to set up rules and regulations for financial education.



中国金融博物馆

中国金融博物馆创建于2010年6月并陆续建立了五家专业主题金融博物馆：中国金融博物馆（天津）、中国基金博物馆（苏州）、国际金融博物馆（北京）、互联网金融博物馆（北京）和并购博物馆（上海），是以声光电影等科技手段和实物收藏为主体的金融启蒙与教育高端社区平台，在金融业具有广泛影响力。

Chinese Museum of Finance

Chinese Museum of Finance (CMOF) was founded in June, 2010 and opened its door to the public respectively with 5 professional financial-related museums: Chinese Museum of Finance (Tianjin), Chinese Museum of Funds (Suzhou), the Museum of Global Finance (Beijing), the Museum of Internet Finance (Beijing) and the Museum of Mergers and Acquisitions (Shanghai). The museums are leading destination for a comprehensive and compelling introduction to the history of finance with multiple perspectives.



中国金融教育发展基金会

中国金融教育发展基金会成立于 1992 年，是经中国人民银行批准、在民政部登记注册，由中国人民银行业务主管的具有独立法人地位的全国性公募基金会。原始基金为 1000 万元，现有净资产约 6886 万元。

自成立之日起，中国金融教育发展基金会即以推动金融教育事业发展为己任，按照提高金融从业者素质和向民众普及金融知识的办会宗旨，设立并坚持开展主题鲜明、形式多样的评选表彰奖励、评审奖励、扶贫助学、境内外培训、专题讲座、研修研讨等活动。依靠社会各界尤其是金融系统的支持捐助，发挥公益组织优势，大力开展与金融教育相关的公益活动，以此推动我国金融教育事业的发展。

2008 年，根据时任理事长吴晓灵的提议，确定在继续深入开展以往的各项公益业务活动的基础上，在中西部地区开展“金融惠民工程”，简称“金惠工程”，旨在通过金融知识普及教育推动农村金融创新，改善农村信用和金融环境，提高金融服务在贫困地区的可获得性，从而助推扶贫开发事业的发展。2014 年，中国人民银行等 7 部委联合下发《关于全面做好扶贫开发金融服务工作的指导意见》（银发〔2014〕65 号），明确提出“中国金融教育发展基金会等社会团体要加强协同配合，充分发挥‘金融惠民工程’、‘送金融知识下乡’等项目的作用，积极开展对贫困地区特定群体的专项金融教育培训”，为基金会赋予了新的使命。

2007 年和 2012 年，基金会先后两次被民政部评定为三 A 级基金会。

China Foundation for Development of Financial Education

China Foundation for Development of Financial Education, Established in 1992, which was approved by the People's Bank of China and registered in the Ministry of Civil Affairs, is a national public foundation with independent legal person under the control of the People's Bank of China. The original fund was 10 million RMB, till now the net assets. It is about 68.86 million RMB.

Since its establishment, China Foundation for Development of Financial Education aims to take the responsibility of promoting financial education development. It focus on improving the financial employer's quality, promoting financial knowledge, setting up and insisting to carry out distinct themes with various forms of activities which include recognition award, assessment of reward, poverty alleviation, domestic and overseas training, lectures, seminars and other activities. The foundation relies on the communities, especially financial systems, supports, develops the advantage of commonweal organizations and vigorously carries out financial education-related commonweal activities, so as to push forward the development of financial education.

In 2008, according to the proposal of Ms. Xiaoling Wu, former director of China Foundation for Development of Financial Education, it was determined to start "Financial Devotion and Service Project" (referred to as the "Jinhui Project") in the Midwest based on past various commonweal activities. The project aims at promoting rural financial innovation through financial literacy education, improving rural credit, financial environment and availability of financial service in distressed area, so as to boost the development of poverty alleviation. In 2014, the People's Bank of China and other six ministries jointly issued "Guidance on Comprehensive Financial Services to do the Work of Poverty Alleviation and Development" (YF [2014] No. 65), which clearly stated that "China Foundation for Development of Financial Education and other public organizations need to strengthen cooperation, fully develop the role of 'Financial Devotion and Service Project', 'Sending Financial Knowledge to the Countryside' and other projects and actively carry out the special financial education and training for specific groups indistressed area, thus the foundation was entrusted with the new mission.

In 2007 and 2012, the Foundation has been twice rated AAA by Ministry of Civil Affairs of the People's Republic of China.

中国货币与金融博物馆联盟

中国货币与金融博物馆联盟由 22 家国内与金融相关的博物馆联合发起，中国金融教育发展基金会担任主席，中国金融博物馆担任秘书长。联盟的宗旨是促进中国货币与金融博物馆行业的稳定、健康、快速发展，适应新形势下博物馆的生存和发展。

China Alliance of Money & Financial Museums

China Alliance of Money & Finance Museums was set-up by 22 domestic finance-related museums, China Foundation for Development of Financial Education as the Chairman, Chinese Museum of Finance as Secretary-General. The purpose of the alliance is to promote a stable, healthy and rapid development of China's monetary and financial museum industry, and to help museums fit in with the requirements of their survival and development under new social circumstances.



北京市金融工作局

北京市金融局是负责促进本市金融发展、金融服务和金融市场建设工作的市政府直属机构。

Beijing Municipal Bureau of Financial Work

Beijing Municipal Bureau of Financial Work is a bureau directly under the Beijing Municipality, who is responsible for promoting the city's financial development, financial services and the construction of financial market.

金融启蒙贡献奖简介

金融启蒙和普惠金融是当代金融制度的重要基石，全球金融博物馆协会和首届全球金融博物馆博览会首次颁发奖项，鼓励在这个领域里做出重要贡献的机构与人物。

Financial Literacy Contribution Award

Financial literacy and inclusive finance are the key cornerstones of modern financial system. International Federation of Finance Museums and the First Global Financial Museum Expo are the first to present awards to individuals and organizations who had made outstanding contributions in these areas.

首届全球金融博物馆博览会的简介

2014 年 10 月，作为全球金融博物馆协会两个发起理事机构的中国金融博物馆和中国金融教育发展基金会正式向协会提出在中国北京承办首届全球金融博物馆博览会的提案，经过一天讨论，得到 20 位各国理事的同意，确定 2015 年 10 月在北京举办继美国纽约（2013）和意大利都灵（2014）后的第三次年会，同时举办博览会，届时将有超过 40 家来自全球各地的金融博物馆集聚北京。

金融启蒙（Financial Literacy）和普惠金融（Inclusive Finance）已经成为全球各国金融市场的核心指标，美国和欧洲将此列入国家发展战略。首届全球金融博物馆博览会将以金融启蒙和普惠金融为主题，邀请各国专家到会分享经验，这是体现了中国金融启蒙与教育的国际地位的重要事件，也是展示中国金融发展和参与制定全球金融标准的重要机遇。

目前，中国金融博物馆和中国金融教育发展基金会作为博览会的两个主办机构正在紧锣密鼓地推进。中国银行业监督管理委员会原主席刘明康先生、中国人民银行原副行长吴晓灵女士、全球金融博物馆协会联席主席鲁莎迪女士等担任博览会顾问。博览会将在 2015 年 10 月 29 日到 11 月 1 日期间在北京举办。主要包括：

- 全球金融博物馆协会理事会与第三次年会，超过 20 个国家和地区参加；
- 中国货币与金融博物馆联盟理事会与第三次年会，超过 20 个机构参加；
- 全球各地金融博物馆布展演示，超过 30 家参加；
- 首届中国金融启蒙年会，金融启蒙与普惠金融主题；
- 全球金融博物馆协会颁发全球金融启蒙贡献奖；
- 首届博网中国金融博物馆大学生挑战赛颁奖暨 100 家企业聘用仪式；

预计四天里重要讲演嘉宾超过 50 位，到会嘉宾约 1000 人，参观人数 3 万人。我们欢迎全国各界关注并参与，推动中国金融启蒙与普惠金融与全球同行的合作与发展。



Introduction of the 1st Global Financial Museum Expo

In October 2014, as the executive directors of IFFM, the Chinese Museum of Finance and China Foundation for Development of Financial Education formally proposed to the IFFM to host the 1st Global Financial Museum Expo. After a whole day's discussion, 20 directors determined that the 3rd IFFM Annual Conference will be held in October 2015 in Beijing after New York (USA, 2013) and Turin (Italy, 2014) as well as the 1st Global Financial Museum Expo, where more than 40 financial museums from all over the world will be gathered in Beijing.

Financial Literacy and Inclusive Finance has become every country's core financial market index. The United States and Europe have included them into national development strategies. The theme of this Expo will be Financial Literacy and Inclusive Finance, and will invite experts from different countries to attend and share their experience. This Expo is a significant event as it reflects the international status of China's Financial Literacy and education. It is also an important opportunity for China to show its financial development and participation in setting global financial standards.

At present, as the two organizers, the Chinese Museum of Finance and China Foundation for Development of Financial Education are redoubling its efforts to prepare and promote this Expo. Mr. Mingkang Liu, former Chairman of China Banking Regulatory Commission, Ms. Xiaoling Wu, former Deputy Governor of People's Bank of China and Ms. Annamaria Lusardi, Co-Chairman of International Federation of Finance Museums (IFFM) are the advisors. The Global Financial Museum Expo will be held from October 29 to October 31, 2015 in Beijing and will include the following key events:

- Executive board meeting of IFFM and the 3rd annual conference, where more than 20 countries and areas will participate;
- Executive board meeting and the 3rd annual conference of China Alliance of Monetary & Finance Museum, where more than 20 organizations will participate;
- Exhibitions for global financial museums, where more than 30 museums will participate;
- The 1st Annual Conference of China Financial Literacy, with a focus on Financial Literacy and Inclusive Finance;
- The IFFM Financial Literacy Award Ceremony;
- The 1st Chinese Museum of Finance College Student Challenge (the 100 Enterprises Employment Contract Signing Ceremony).

There will be more than 50 keynote speakers, approximately 1000 guests and over 30,000 visitors. We welcome participations from all members of the public to promote the cooperation and development between China and other countries in Financial Literacy and Inclusive Finance.

金融启蒙北京宣言——全球金融博物馆协会

金融启蒙是当今社会的必备技能之一，正如不具备基本读写能力很难在工业化社会中立足。因此，金融启蒙的缺失将使人无法应对当今世界。

何为金融启蒙？金融启蒙不仅是拥有金融概念知识，更重要的是能运用这些知识去改善个人以及社会的财务状况。金融启蒙使人们可以全方位地投入经济生活。因此，它对于个人、家庭、群体、国家乃至世界经济都极为重要。金融启蒙的需求具有普遍性。此宣言在倡导金融启蒙重要性的同时更是一份动员书。

我们为什么需要金融启蒙？这是因为全球金融市场、劳动市场以及养老金体系时刻都在发生变化。因此，人们更有条件主导自己的生活，也由此需要做更多的财务规划和决策，例如：教育投资、退休金储蓄、风险防范和债务管理。部分人还有抚养子女和赡养老人的责任。此外，人们还须进行日常财务运转管理，例如：付款、预算、还贷等。这些大小决策对个人和社会的影响举足轻重。

虽然金融启蒙至关重要，但目前全球各地的金融知识水平普遍不高，包括一些金融市场成熟的国家，以至于人们无法周全地处理金融事务。据全球金融启蒙调查和国际学生评估项目（PISA）数据显示，真正具有金融启蒙知识的人比例极少。金融启蒙是一项世界性的挑战，所有国家无一例外。

金融启蒙缺乏的问题在青年人、老年人、妇女、低收入和低学历人群中尤为突出。金融启蒙的不平衡问题在少年时期便有所显现，并会随着人们年龄的增长而更加严重。

我们对金融启蒙缺乏问题极为关心，因为它会导致严重后果。没有金融启蒙的人很难参与金融市场活动，无法进行合理的财务规划，出现债务问题的机率也会更高。正如近期金融危机所示，在缺乏金融知识的情况下，获取贷款可能会对个人和社会带来严重损失。因此，我们迫切需要提高金融启蒙。必须马上行动。

我们对未来的愿景

全球金融博物馆协会将不遗余力地在全世界宣扬金融启蒙。我们希望成为金融启蒙的启明灯，带头启动更多新项目。提高金融启蒙水平迫在眉睫，我们需要立即行动。

博物馆是一个面向大众的学习媒介。其创新作用使正式及非正式学习更加丰富。在我们的博物馆，孩子有时也是老师。我们致力于将博物馆作为一个提高金融知识的平台。

金融启蒙以历史、数学、科学和公民教育为基础。我们将展示金融启蒙在不同领域的作用，并用体验式学习、游戏和互动展览等方式对其进行推广。我们还有固定展览和路演。

我们将把金融启蒙定位为终身学习的一部分，这些知识的积累将造福各个年龄段以及理解能力不同的人。协会致力于提高全民金融启蒙水平，尤其是处于人生转折点的人。

协会将携手政策制定者、国际组织、学术带头人、实践者以及金融启蒙的其他倡导者共同推进金融启蒙进程。

协会将以鼓励研究的方式来推动政策的实行，包括如何衡量金融启蒙水平和金融教育课程的有效性。我们希望看到金融启蒙短期、中期以及长期的实效性变化。

呼吁行动

协会致力于把金融启蒙推向全世界，并将通过与世界各博物馆的合作与交流，让世界各国人民都意识到金融启蒙的重要性。我们的协作会带来改变，但是要解决金融启蒙危机，我们需要你们的合作。

加入我们，成为金融启蒙大使。在你的学校、公司、图书馆、博物馆发起倡导，让我们共同推动金融启蒙的发展。

Beijing Financial Literacy Manifesto of the International Federation of Finance Museums

Financial literacy is an essential skill in today's society. Just as it was not possible to thrive in an industrialized society without basic literacy—the ability to read and write—so it is not possible to navigate today's world without being financially literate.

What is financial literacy? Financial literacy refers not just to the knowledge of financial concepts but also the capacity to use that knowledge to improve the financial well-being of individuals and society. Financial literacy makes it possible for individuals to fully participate in economic life, and, as such, it is important for individuals, families, communities, countries, and our global economy. In other words, the need for financial literacy is universal, and this is what unites us. Our manifesto is both a declaration of the importance of financial literacy and a call for action.

Why do we all need financial literacy? Changes in financial markets, labor markets, and pension systems are occurring rapidly around the world. Today, individuals are much more in charge of their well-being than was the case in the past. People are required to make important financial decisions, including investing in education and training, saving for retirement and other life-cycle events, insuring against risk, and managing debt. Some individuals are also in charge of the financial well-being of others, such as children or elderly parents. Moreover, individuals must deal with day-to-day financial management decisions: making payments, budgeting, paying off debt, and more. These small and large decisions impact both the individual and society.

While financial literacy is critically important, the levels of financial knowledge around the world are very low—much too low to enable people to make effective decisions. Financial literacy is low even in countries with well-developed financial markets and high per-capita income. Both the Global Financial Literacy Survey and the Programme for International Student Assessment (PISA) financial literacy data show that few people are financially literate. Financial illiteracy is a global challenge, and every country is affected by it.

Some groups are particularly vulnerable. While financial illiteracy is widespread, it is particularly severe among the young and the elderly, women, those with low income, and those with low educational attainment. Inequality in financial literacy appears early in life and widens over the lifecycle.

We care about lack of financial literacy because there are severe consequences associated with it. Those who are not financially literate are less likely to participate in financial markets, are less likely to save and plan for the future, and are more likely to have problems with debt. As the recent financial crisis made clear, access to credit without proper financial knowledge can result in harmful costs for both the individual and for society. We are at a crisis point when it comes to financial literacy and we need to take action.

Our Vision for the Future

The International Federation of Finance Museums will ignite effort to promote financial literacy around the world. We want to be a beacon of light for financial literacy and guide many new initiatives. We need to act now to address an urgent need to increase financial literacy levels around the world.

Museums are forums for learning, open to the public and embracing all. They provide innovation that enriches formal and informal learning. In our museums, children are sometimes the teachers. We are committed to and passionate about using museums as an instrument for improving financial knowledge.

Financial literacy is grounded in history, math, science, and civic education. We will showcase financial literacy's role in and through many disciplines. And we will employ a spectrum of learning processes—including experiential learning, labs, games, and interactive exhibitions—to advance financial literacy. We have both permanent exhibits and exhibits designed to travel around the world.

We will position financial literacy as part of lifelong learning, elevating knowledge that benefits individuals at all ages, at all levels of understanding. The Federation is committed to improving financial literacy for all—from the very young to the very old—and to targeting people at critical stages of the life cycle.

The Federation will engage policymakers, international organizations, thought leaders, practitioners, and others involved in financial literacy initiatives to push forward the agenda for financial literacy.

To inform policy, the Federation will promote research, including the measurement of financial literacy and the effectiveness of financial education programs. We will seek tangible changes in financial literacy in the short, medium, and long term.

Call for action

Through its collaboration and exchanges with museums around the world, the Federation is committed to promoting financial literacy globally, raising awareness that every individual in every country is in need of financial literacy. Our partnership will bring changes but to tackle the financial literacy crisis, we need your collaboration.

Join us and become an ambassador for financial literacy. Demand it in your school, your workplace, your library, your museum. Let's stand up for financial literacy.

中国金融启蒙中心简介

中国金融博物馆自 2010 年在天津创建以来，已经分别在苏州、北京和上海连续创立了 5 家主题金融博物馆。同时，中国金融博物馆书院也分别在北京、上海、武汉和广州建立了分院。超过 40 万人莅临博物馆和书院，5 千万以上受众了解品牌。中国金融博物馆已经成为国内领先的金融启蒙与普惠金融推广平台。

中国金融博物馆参与发起了中国货币与金融博物馆联盟，已经有 22 个成员机构加盟。同时，我们也参与发起了全球金融博物馆协会，已经有 22 个国家加盟。2015 年 10 月底，我们主办首届全球金融博物馆博览会，32 家来自中国美国英国意大利等 11 个国家的金融相关博物馆集聚北京，中国金融博物馆将接替美国担任全球金融博物馆协会的主席。这是中国参与全球金融启蒙和普惠金融标准制定的重要契机，我们得到了中国金融学会和中国金融教育发展基金会的支持。

中国金融博物馆在已经运行三年的金融启蒙委员会基础上正式创建中国金融启蒙中心 (China Center of Financial Literacy)，作为民间公益机构，以市场方式推动金融启蒙和普惠金融发展的战略研究、培训、评奖和标准制定。目前中心的理事会成员有：

魏迎宁 中国保险监督管理委员会原副主席
【主席】

王巍 中国金融博物馆理事长【秘书长】

唐宁 宜信集团主席【副秘书长】

白丽华 中国金融博物馆馆长【副秘书长】

唐新宇 中国银行年金理事会原理事长

杨 鹤 博时基金董事长

霍学文 北京市金融工作局党组书记

陈全生 国务院参事

解植春 汇金公司原总经理

李山泉 美国奥本海默基金高级副总裁

杨再平 中国银行业协会副会长

王晓蕾 中国人民银行征信中心副主任

启蒙中心所有理事成员均是公益参与，启蒙中心所有项目活动均是非商业性质。启蒙中心将继续推进启蒙委员会的以下工作：

- 金融启蒙系列丛书的出版（2010-）
- 每年颁发中国青年金融学者奖（2012-）
- 不定期颁发中国金融教育贡献奖（2012-）
- 中国金融口述工作室（2012-）
- 中国公民金融素质调查（2013-）
- 中国金融生态城市评选活动（2014-）
- 中国大学生金融博物馆挑战赛（2015-）

Introduction of China Center of Financial Literacy

After its establishment in Tianjin in 2010, Chinese Museum of Finance has founded 5 theme financial museums in Suzhou, Beijing and Shanghai. In the meantime, Academy of Financial Museum set up the branch academies in Beijing, Shanghai, Wuhan and Guangzhou. More than 400,000 visitors have patronized the museums and academies and in excess of 50 million people are aware of the brand. Chinese Museum of Finance becomes an advanced platform for promoting financial literacy and inclusive finance in China.

Chinese Museum of Finance initiated and participated in the China Alliance of Money and Finance Museums, which has 22 member organizations till now. In the mean time, we initiated and participated in International Federation of Finance Museums (IFFM) and already getting 22 countries joined in. In the end of October 2015, we will hold the Global Financial Museum Summit, which will gather 32 financial related museums from 11 countries including China, United State, United Kingdom, Italy etc in Beijing; besides, Chinese Museum of Finance will become the chairman of IFFM taking over from the United State. This is an important opportunity for China to participate in the standard formulation of international financial literacy and inclusive finance, and we also get support from China Society for Finance and Banking and China Foundation for Development of Financial Education.

Based on the Financial Literacy Committee after 3 years running, Chinese Museum of Finance has founded the China Center of Financial Literacy officially as a private welfare agency, to use market method to promote the financial literacy and inclusive finance development, training, awards and standard formulation. Currently the members of the Center are:

Mr. Yingning Wei, Former chairman of China Insurance Regulatory Commission [Chairman]
Mr. Wei Wang, Chairman of the Chinese Museum of Finance [Secretary-General]
Mr. Ning Tang, the President of CreditEase [Deputy Secretary-General]
Ms. Lihua Bai, Curator of Chinese Museum of Finance [Deputy Secretary-General]
Ms. Xinyu Tang, Former Chairman of annuity council of the Bank of China
Ms. Kun Yang, Chairman of Bosera
Mr. Xuewen Huo, Secretary of Beijing Municipal Bureau of Financial Work
Mr. Quansheng Chen, State Department Counselor Solutions for spring planting, the former general manager of China Safe Investments Limited
Mr. Zhichun Xie, former director of Huijin Company
Mr. Shanquan Li, Senior Deputy President of Oppenheimer Funds
Mr. Zaiping Yang, Deputy Chairman of China Banking Association
Ms. Xiaolei Wang, Deputy Director of China People's Bank of Credit Information Center

All committee members are involved in public service; all project activities of the literacy center are non-commercial. China Center of Financial Literacy will continue to promote the work of the Committee as follows:

- To publish the Financial Literacy Series (2010-)
- To award the China Youth Financial Scholar Award annually (2012-)
- To issue the Chinese Financial Literacy Award occasionally (2012-)
- To establish the Chinese financial oral studio (2012-)
- To carry out the financial quality survey of Chinese citizens (2013-)
- To carry out selected activities of financial ecological cities in China (2014-)
- To hold the "Financial Museum of China Challenge" for college students (2015-)

组委会成员

Members of the Organizing Committee



安娜玛利亚·鲁莎迪
全球金融博物馆协会联席主席

Ms. Annamaria Lusardi
Co-Chairman of International Federation of Finance Museums



刘明康
中国银行业监督管理委员会原主席

Mr. Mingkang Liu
Former Chairman of China Banking
Regulatory Commission



吴晓灵
中国人民银行原副行长

Ms. Xiaoling Wu
Former Deputy Governor of
People's Bank of China











组织机构

Organization

联合主办	全球金融博物馆协会（IFFM） 中国金融博物馆 中国金融教育发展基金会	Co-sponsored	International Federation of Finance Museums Chinese Museum of Finance China Foundation for Development of Financial Education
学术支持	中国金融学会 北京市金融工作局	Academic Support	China Society for Finance and Banking Beijing Municipal Bureau of Financial Work
联合协办	中国货币与金融博物馆联盟	Co-organization	China Alliance of Money & Finance Museums










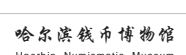

参会的境外金融博物馆





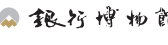




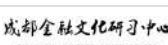
The list of invited global financial museums

	美国金融博物馆 Museum of American Finance	USA
	美国金融启蒙中心 Global Financial Literacy Excellence Center(GFLEC)	USA
	墨西哥经济博物馆 Museo Interactivo de Economia	Mexico
	大英博物馆：花旗钱币画廊 The British Museum (Citi Money Gallery)	UK
	加拿大银行博物馆 Bank of Canada Museum	Mexico
	意大利金融博物馆 Saving Museum (Museo del Risparmio)	Italy
	捷克国家银行货币博物馆 Money Museum, Czech National Bank	Czech
	奥地利金融生活公园 Financial life park	Austria
	孟加拉银行货币博物馆 Taka Museum (Currency Museum)	Bangladesh
	希腊钱币博物馆 Epigraphic & Numismatic Museum	Greece

参会的国内金融博物馆

The list of invited Chinese financial museums

	中国金融博物馆 Chinese Museum of Finance	天津
	中国基金博物馆 Chinese Museum of Funds	江苏
	国际金融博物馆 The Museum of Global Finance	北京
	互联网金融博物馆 The Museum of Internet Finance	北京
	对外经济贸易大学校史博物馆 The University of International Business and Economics Historical Museum	北京
	东北亚金融博物馆 Northeast Asian Financial Museum	长春
	东莞市钱币博物馆 Dongguan Numismatic Museum	广东
	广州货币金融博物馆 Guangzhou Monetary and Finance Museum	广东
	广西钱币博物馆 GuangXi Numismatic Museum	广西
	哈尔滨钱币博物馆 Haerbin Numismatic Museum	黑龙江
	河北金融学院金融博物馆 Finance Museum of Hebei Finance University	河北

	河北钱币博物馆 Hebei Numismatic Museum	河北
	知府衙门博物馆 Nanyang Zhifu yamen Museum	河南
	宁波钱币博物馆 Ningbo Numismatic Museum	浙江
	齐鲁钱币博物馆 Qilu Numismatics Museum	山东
	银行博物馆 Banking Museum	上海
	沈阳金融博物馆 Financial Museum Shenyang	沈阳
	徐州圣旨博物馆 Imperial Decree Museum	江苏
	浙江维融反假货币陈列馆 Zhejiang Weirong Anti-Counterfeiting Money Exhibition Hall	浙江
	中国钱币博物馆 China Numismatic Museum	北京
	成都市共品钱币博物馆 Chengdu Gongpin numismatic museum	四川
	成都金融文化研习中心 Financial Culture Study Center	四川

2015 首届全球金融博物馆博览会日程安排

10 月 29 日 全球金融博物馆协会理事国会议 地点：国际金融博物馆	
10:00-15:00	中国货币与金融博物馆联盟成员签到
15:00-18:00	全球金融博物馆协会理事国会议 美国、意大利、中国、墨西哥
17:00-18:00	全球金融博物馆协会成员国签到 参观国际金融博物馆
18:00-20:00	全球金融博物馆协会成员国欢迎晚宴
主 持 人：初本德（中国金融教育发展基金会理事长、 中国货币与金融博物馆联盟轮值主席）	

10 月 30 日

上午：全球金融博物馆协会论坛

地点：互联网金融博物馆

- | | |
|-------------|---|
| 08:30-09:30 | 国内外机构签到
参观互联网金融博物馆 |
| 09:30-12:00 | 全球金融博物馆协会论坛
主 持 人：Giovanna Paladino（意大利金融博物馆馆长）
全球金融博物馆协会成员机构发言 |
| 12:00-13:30 | 午餐演讲
演讲嘉宾：霍学文（北京市金融工作局党组书记） |

下午：中国货币与金融博物馆联盟第三次年会

- | | |
|-------------|---|
| 13:30-17:30 | 中国货币与金融博物馆联盟第三次年会
主 持 人：白丽华（中国金融博物馆馆长、
中国货币与金融博物馆联盟秘书长）
会议主题发言
初本德（中国金融教育发展基金会理事长、
中国货币与金融博物馆联盟轮值主席）
白丽华（中国金融博物馆馆长、中国货币与金融博物馆联盟秘书长）
联盟秘书长汇报 2015 年联盟工作 |
| 17:30-18:00 | 晚餐 |
| 18:00-20:00 | 联盟成员工作经验交流
讨论 2016 年联盟成员合作意向及合作计划 |

10月31日

上午：全球金融博物馆动态交流

地点：国际金融博物馆

09:30-11:30 主 持 人：盛 溢（中国金融博物馆全球理事）
发 言：全球金融博物馆协会机构发言
中国货币与金融博物馆联盟机构发言

11:30-13:00 午餐演讲
演讲嘉宾：陈履生（中国国家博物馆副馆长）

下午：全球金融博物馆博览会主题论坛及颁奖晚宴

地点：北京展览馆报告厅

14:30-14:40 主题论坛
主 持 人：王 巍（中国金融博物馆理事长）

14:40-15:00 金融启蒙北京宣言
宣读嘉宾：Annamaria Lusardi（全球金融博物馆协会联席主席）

15:00-15:20 全球金融博物馆协会轮值主席国交接仪式
主 持 人：初本德（中国金融教育发展基金会理事长、
中国货币与金融博物馆联盟轮值主席）
交接仪式致辞：
Annamaria Lusardi（全球金融博物馆协会联席主席）
Giovanna Paladino（意大利金融博物馆馆长）
王 巍（中国金融博物馆理事长）

15:20-16:20 致 辞：李士祥（北京市常务副市长）
演讲嘉宾：
潘功胜（中国人民银行党委委员、副行长）
李东荣（中国人民银行原副行长）
Annamaria Lusardi（全球金融博物馆协会联席主席）
Edmund Phelps（美国哥伦比亚大学教授、2006年诺贝尔经济学奖获得者）

16:20-16:40 中国金融启蒙中心成立
主 持 人：魏迎宁（中国保险监督管理委员会原副主席）

16:40-17:30	演讲嘉宾： 唐 宁（宜信公司创始人兼 CEO） 戴 兵（中国光大集团股份公司工会委员会副主席、 中国光大银行工会工作委员会副主任、 中国光大银行信用卡中心总经理） 赵学军（嘉实基金管理有限公司董事长）
17:30-18:00	颁奖晚宴入场 主 持 人：田 薇（中央电视台主持人）
18:00-19:00	致 辞：隋振江（北京市副市长） 演讲嘉宾： 刘明康（中国银行业监督管理委员会原主席） 吴晓灵（中国人民银行原副行长） 阎庆民（天津市副市长）
19:00-21:00	颁奖晚宴

11 月 1 日
中国金融启蒙与普惠金融年会
地点：北京展览馆报告厅

09:00-10:00	中国金融启蒙与普惠金融年会 主 持 人：白丽华（中国金融博物馆馆长、 中国货币与金融博物馆联盟秘书长） 中学生“金融启蒙读本”和“金融常识”发布 致 辞：王 巍（中国金融博物馆理事长） 主讲嘉宾：魏迎宁（中国保险监督委员会原副主席） 刘大伟（宜信公司高级副总裁） 孙宏生（众筹网首席执行官） 李成才（中央电视台经济频道特别节目组主编）
10:00-10:30	2015 年中国金融博物馆大学生金融挑战赛优胜者颁奖仪式 视频：不忘初心、更上层楼 颁奖仪式
10:30-11:00	企业宣讲：泰康人寿、苏州银行、迷你旅游
11:00-11:20	普惠金融人才成长计划启动仪式

Global Financial Museum Expo 2015 Draft Agenda

29 October

P.M.: Executive Board Meeting of International Federation of Finance Museums(IFFM)

Venue: The Museum of Global Finance

15:00-18:00	Executive Board Meeting IFFM (USA, Italy, China, Mexico)
17:00-18:00	Registration of IFFM members Guided visit to the Museum of Global Finance
18:00-20:00	Welcome dinner for IFFM members Moderator: Mr. Bende Chu (Chairman of China Foundation for Development of Financial Education, Rotating Chairman of China Alliance of Money & Finance Museums)

30 October

A.M.: International Federation of Finance Museums Forum

Venue: The Museum of Internet Finance

08:30-09:30	Registration of all organizations Guided visit to the Museum of Internet Finance
09:30-12:00	IFFM Forum Moderator: Giovanna Paladino (Director of Saving Museum) Speech: Alliance member speech
12:00-13:30	Luncheon party Keynote speech: Mr. Xuwen Huo (Bureau Head of Beijing Financial Office)

P.M.: Visiting Chinese Museum of Finance

Venue: Chinese Museum of Finance

13:30-15:30	IFFM members transfer to Tianjin by bus
15:30-16:30	Guided visit of Chinese Museum of Finance
16:30-16:45	Welcome address Mr. Wei Wang (Chairman of Chinese Museum of Finance)
16:45-18:00	Welcome & Gratitude Guest speech Mr. Qingmin Yan (Deputy mayor of Tianjin City) Mr. Ke Gong (Alternative Member of the Central Committee, President of Nankai University) Mr. Xinli Xue (Committee secretary of Tianjin Municipal Party) Mr. Fu'an Li (Chairman of China Bohai Bank)
18:00-18:15	Financial museum strategic signing ceremony
18:15-20:00	Dinner party
20:00-22:00	Back to Beijing

31 October

A.M.: Presentation of Global Financial Museum Trends

Venue: The Museum of Global Finance

- | | |
|-------------|--|
| 09:30-11:30 | <p>Moderator:</p> <p>Mr. Yi Sheng (Global Director of Chinese Museum of Finance)</p> <p>Speech: Alliance member speech</p> |
| 11:30-13:00 | <p>Luncheon Party</p> <p>Keynote speech: Mr. Lvsheng Chen
(Deputy curator of the National Museum of China)</p> |

P.M.: Opening Ceremony of Global Financial Museum Expo. & Theme Forum

Venue: Reporting Hall of Beijing Exhibition Center

- | | |
|-------------|--|
| 14:30-14:40 | <p>Theme Forum</p> <p>Moderator: Mr. Wei Wang (Chairman of Chinese Museum of Finance)</p> |
| 14:40-15:00 | <p>Beijing Financial Literacy Manifesto</p> <p>Announcement: Ms. Annamaria Lusardi (Co-Chairman of IFFM)</p> |
| 15:00-15:20 | <p>Ceremony for rotating chairmen of IFFM</p> <p>Moderator: Mr. Bende Chu (Chairman of China Foundation for Development of Financial Education, Rotating chairman of China Alliance of Money & Finance Museums)</p> <p>Speech:</p> <p>Ms. Annamaria Lusardi (Co-Chairman of IFFM)</p> <p>Ms. Giovanna Paladino (Director of Saving Museum)</p> <p>Mr. Wei Wang (Chairman of Chinese Museum of Finance)</p> |

15:20-16:20	<p>Address:</p> <p>Mr. Shixiang Li (Executive vice mayor of Beijing)</p> <p>Guest speech</p> <p>Mr. Gongsheng Pan (Deputy governor and party committee of People's Bank of China)</p> <p>Mr. Dongrong Li (Former deputy governor of the People's Bank of China)</p> <p>Ms. Annamaria Lusardi (Co-Chairman of IFFM)</p> <p>Mr. Edmund Phelps (Professor of Columbia University, 2006 Nobel Laureate in Economics)</p>
16:20-16:40	<p>Foundation Ceremony of National Financial Literacy Center</p> <p>Moderator: Mr. Yingning Wei (Former vice chairman of the China Insurance Regulatory Commission)</p>
16:40-17:30	<p>Guest speech</p> <p>Mr. Ning Tang (the Founder and CEO of CreditEase)</p> <p>Ms. Bing Dai (Vice Chairman of China Everbright Group Co., Ltd. Trade Union Committee, Deputy director of the China Everbright Bank Trade Union Work Committee, Manager of China Everbright Bank Credit Card Center)</p> <p>Mr. Xuejun Zhao (Chairman of Harvest Fund Management Company)</p>
17:30-18:00	<p>Gala Dinner entrance</p> <p>Moderator: Ms. Wei Tian (CCTV Moderator)</p>
18:00-19:00	<p>Address: Mr. Zhenjiang Sui (Deputy Mayor of Beijing)</p> <p>Guest Speech</p> <p>Mr. Mingkang Liu (Former chairman of the China banking regulatory commission)</p> <p>Ms. Xiaoling Wu (Former deputy governor of the People's Bank of China)</p> <p>Mr. Qingmin Yan (Deputy Mayor of Tianjin)</p>
19:00-21:00	<p>Gala Dinner</p>

演讲嘉宾（按姓氏首字母排序）



安娜玛利亚·鲁莎迪
全球金融博物馆协会联席主席

Dr. Annamaria Lusardi
Co-Chairman of International Federation of Finance Museums

丹尼特基金著名学者，美国华盛顿大学商学院经济会计学教授。曾在达特茅斯学院担任 20 年经济学教授。曾任教于普林斯顿大学、芝加哥大学公共政策学院、芝加哥大学布斯商学院和哥伦比亚大学商学院。2008 在哈佛商学院做访问学者，曾担任全球金融启蒙卓越中心的学术主任，金融启蒙中心主任。因个人金融启蒙贡献获得了包括威廉奥多姆富有远见领导奖等众多奖项。发表五十多篇学术论文，并编辑了两本金融启蒙相关的书籍。

Annamaria Lusardi is the Denit Trust Distinguished Scholar and Professor of Economics and Accountancy at the George Washington University School of Business. Previously, she was the Joel Z. and Susan Hyatt Professor of Economics at Dartmouth College, where she taught for twenty years. She has also taught at Princeton University, the University of Chicago Public Policy School, the University of Chicago Booth School of Business and Columbia Business School. In 2008 she was a visiting scholar at Harvard Business School. Moreover, she is the Academic Director of the Global Financial Literacy Excellence Center, and the Director of the Financial Literacy Center, a joint Center with Dartmouth College, the Rand Corporation, and the Wharton School. Dr. Lusardi has won numerous awards. Among them is the William E. Odom Visionary Leadership Award from the Jump\$tart Coalition for Personal Financial Literacy, the National Numeracy Network's inaugural Steen Award and the Fidelity Pyramid Prize. She has written more than fifty academic articles and edited two books on financial literacy. Dr. Lusardi received her Ph.D. in Economics from Princeton University.



白丽华
中国金融博物馆馆长
中国货币与金融博物馆联盟秘书长

M s. L hua B a i
Curator of Chinese Museum of Finance
Secretary of China Alliance of Money & Finance Museums

天津商业大学硕士生导师，教授。中国金融博物馆馆长，中国货币与金融博物馆联盟秘书长，中国钱币协会常务理事。长期从事金融启蒙教育。

Master's tutor and professor of Tianjin Business University, Curator of the Chinese Museum of Finance, Secretary General of China Alliance of Money & Finance Museums, Director of Chinese Numismatic Association, engaged in financial literacy education for long term.



陈履生
中国国家博物馆副馆长

M r.Lvsheng Chen
Deputy Director of the National Museum of China

1985年毕业于南京艺术学院美术系美术历史及理论专业，获硕士学位。现为中国国家博物馆副馆长。兼任中国美术家协会理事，北京美术家协会副主席，中国汉画学会常务副会长，北京文联理事，北京文艺评论家协会副主席，北京博物馆学会副理事长，中国美术家协会理论委员会副主任，北京美术家协会中国画艺委会副主任，全国文物与博物馆专业学位研究生教育指导委员会委员，中国画学会常务理事，中国艺术视窗网总监，南京艺术学院、吉首大学、广州美术学院、中央民族大学美术学院、北京外交学院、台湾师范大学客座教授。

In 1985, he obtained his Master's Degree in Art History and Criticism at the Department of Fine Arts, Nanjing University of the Arts. Deputy Director of the National Museum of China, he is also a council member of China Artists Association, vice director of Beijing Artists Association, and executive deputy director of Chinese Institute of Han Dynasty's Art, a council member of Beijing Federation of Literary and Art Circles, deputy director of the Association of Artistic Critics in Beijing, deputy secretary general of Beijing Museums Association, deputy director of the Theoretical Committee of China Artists Association, deputy director of the Committee of Chinese Painting of Beijing Artists Association, member of the National Master of Cultural Heritage and Museology Education Steering Committee, executive council member of Chinese Painting Institute, CEO of cnartw.com. He also serves as guest professor at Nanjing University of the Arts, Jishou University, Guangzhou Academy of Fine Arts, Academy of Arts & Design Central University for Nationalities, China Foreign Affairs University and National Taiwan Normal University.



初本德
中国金融教育发展基金会理事长
中国货币与金融博物馆联盟轮值主席

Mr. Bende Chu
Chairman of China Foundation for Development of Financial Education
Rotating Chairman of China Alliance of Money & Finance Museums

硕士研究生学历，高级经济师。现任中国金融教育发展基金会理事长、中国货币与金融博物馆联盟主席、金融博物馆全球协会理事、地方（财经）高校金融教育联盟理事长、对外经贸大学兼职教授。曾任中国人民银行办公厅处长，国家外汇管理局办公室副主任、综合司司长，管理检查司司长，中国人民银行沈阳分行副行长，国家外汇管理局辽宁省分局副局长，中国人民银行系统工会常务副主任（正厅局级），中国人民银行文联主席，中国金融工会常委。初本德曾在报纸期刊发表论文 20 余篇，出版《振兴东北之路》、《地下钱庄问题深度解析》等 20 多部专著（主编）。

Communist Party member, master degree, senior economist, incumbent Chairman of China Foundation for Development of Financial Education; President of China Alliance of Money & Finance Museums, Director of International Federation of Finance Museums (IFFM), Chairman of the Union of Financial Education in Universities (local), adjunct professor of University of International Business and Economics, Former director of the general office of the people's Bank of China, deputy director of the State Administration of Foreign Exchange Office, General secretary, Secretary for management and inspection, Deputy governor of the people's Bank of China (Shenyang branch), deputy director of the State Administration of Foreign Exchange Administration of Liaoning Province, deputy director of trade unions of the People's Bank of China (Bureau level), President of the people's Bank of Chinese Federation, China financial union Standing Committee. Mr. Bende Chu published more than 20 papers in the newspapers and periodicals, published revitalization of Northeast Road, problem of depth analysis of illegal private bank, etc, more than 20 Monographs (Chief Editor).



戴 兵

中国光大集团股份公司工会委员会副主席

中国光大银行工会工作委员会副主任

中国光大银行信用卡中心总经理

M s. B ing Dai

Vice Chairman of China Everbright Group Co., Ltd. Trade Union Committee

Deputy director of the China Everbright Bank Trade Union Work Committee

Manager of China Everbright Bank Credit Card Center

中国光大集团股份公司工会委员会副主席、女工委员会主任、中国光大银行工会工作委员会副主任、中国光大银行信用卡中心总经理、中国银行业协会银行卡专业委员会副主任等职务。北京市石景山区政协委员。从事金融工作二十余年，先后服务于中国银行、招商银行、中国光大银行，具有丰富的银行实践经验，尤其在零售银行业务领域颇有建树。曾荣获中华全国总工会颁发的“全国五一劳动奖章”和“金融五一劳动奖章”、中国银行业协会授予的“银行卡行业引领人物奖”、中华妇女联合会和中国妇女发展基金会颁发的“中国妇女慈善奖－贡献奖”等多项荣誉。

Vice Chairman of China Everbright Group Co., Ltd. Trade Union Committee, Director of Women Workers' Committee, Deputy director of China Everbright Bank Trade Union Work Committee, Manager of China Everbright Bank Credit Card Center, Deputy director of the Bank of China Banking Association etc., Committee member of Shijingshan District Beijing CPPCC. Engaged in financial work for more than twenty years, Has served in Bank of China, China Merchants Bank, China Everbright Bank, she has rich experience in banking industry especially in retail banking, Have been awarded the ACFTU issued the "Five One National Labor" medal and "Financial Five One labor" medal, China Banking Association awarded the "Bank Card Industry Leading Figure Award", China Women's Federation and the China Women's development foundation awarded "China Women's Charity Award – Contribution Award" etc.



埃德蒙·费尔普斯
美国哥伦比亚大学教授
2006 年诺贝尔经济学奖获得者

Mr. Edmund S. Phelps
Professor in Columbia University
Winner of 2006 Nobel Laureate in Economics

新华都商学院院长，2006 年诺贝尔经济学奖获得者，美国哥伦比亚大学教授，美国科学院院士、美国艺术与科学学院院士、纽约科学院院士、美国经济学协会副会长、布鲁金斯经济事务委员会资深顾问、美联储学术会议专家、美国财政部和参议院金融委员会顾问、《美国经济评论》编委委员等。因在新华都商学院所作的突出贡献，2014 年，获得中国政府友谊奖。费尔普斯的研究领域为宏观经济学、经济增长理论、失业和包容性增长、经济增长、商业波动、经济活力。出版了《大繁荣 – 大众创新如何带来国家繁荣》、《工作回报：自主创业的参与与自助》、《意大利的创业和包容性》、《结构性衰退：就业、利率和资产的现代均衡理论》、《提高私企低端薪酬和就业的办法》等著作。

Dean of Newhuadu Business School, 2006 Nobel Laureate in Economics, professor at Columbia University, fellow of National Academy of Sciences, the American Academy of Arts and Sciences and the New York Academy of Sciences; Vice President of American Economic Association, Senior Consultant of Brookings Economics Panel, Expert of academic meetings for the Federal Reserve, Consultant of United States Department of the Treasury and Financial Committee of United States Senate, and Member of the editorial board of the American Economic Review. Because of his contribution to the entrepreneurship education in China, received the China National Friendship Award in 2014. Research Area: Macroeconomics, Economic Growth Theory, Unemployment and Inclusive Growth, Economic Growth, Business Fluctuation and Economic Dynamism. Works and Publications: Mass Flourishing, How to Restore Participation and Self-Support to Free Enterprise, Enterprise and Inclusion in Italy Structural Slumps: The Modern Equilibrium Theory of Employment, Interest and Assets, Editor and contributor, Designing Inclusion: Tools to Raise Low-end Pay and Employment in Private Enterprise.



龚 克
南开大学校长

Mr. Ke Gong
President of Nankai University

教授，南开大学校长。1986 年在奥地利格拉茨技术大学获博士学位，2001 年获选俄罗斯宇航科学院外籍院士。曾任清华大学电子工程系主任、信息科学技术学院院长、微波与数字通信国家重点实验室主任、清华信息科学技术国家实验室（筹）主任、副校长和天津大学校长。主要从事微小区个人移动通信、数字电视传输标准等方面的研究，并从事深空通信等领域的研究，多次获得国家科技奖。

Professor of Nankai University. In 1986, he got Ph.D. in Graz University of Technology, Austria. In 2001, he was a foreign member of the Russian Academy of Astronautics. Former director of electrical engineering department in Tsinghua university, dean of information science and technology, microwave and digital communication, director of the state key laboratory of information science and technology national laboratory (raise), deputy president of Tsinghua University and president of Tianjin university. He engaged in small area personal information communications, digital TV transmission standard research. At the same time, he engaged in deep space communications and research. Won several national awards.



乔瓦尼·帕拉迪诺
全球金融博物馆协会联席主席

Ms. Giovanna Paladino
Co-Chairman of International Federation of Finance Museums

经济学博士，ISP 管理委员会主席办公室负责人兼都灵教育金融博物馆主任。她同时也是 IMF 的经济师，让·莫纳分析员和路易斯大学兼职教授。乔瓦尼·帕拉迪诺本科曾经在 HEI(CH) 和美国布朗大学学习。她曾经分别在《银行和金融》（2013）、《金融市场杂志》（2015）和《金融经济学评论》（2015）发表过多篇关于国际经济、大宗商品市场和公司理财等文章。

Giovanna Paladino, PHD in Economics, is the Head of the Management Board Chairman's Office of ISP and Director of the Museum of Savings, an educational lab located in Turin. She was young economist at the IMF, Jean Monnet fellow at the EUI and Adjoint Professor at LUISS University. She completed her graduate studies at the HEI (CH) and Brown University (USA). She publishes articles on international economics, commodity markets and corporate finance in leading journals, recently in Journal of Banking and Finance (2013), Journal of Financial Markets (2015), Review of Financial Economics (2015).

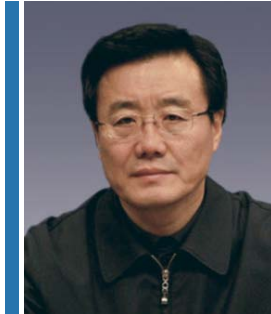


霍学文
北京市金融工作局党组书记

Mr. Huo Xuewen
Secretary of Beijing Municipal Bureau of Financial Work

北京市金融工作局党组书记。研究员，南开大学国际金融学博士、中国人民大学法学博士。历任北京市金融工委副书记、市国资委副主任、市发改委副主任兼金融办主任。曾在《金融研究》、《经济动态》、《南开经济研究》、《中国银行业》等刊物上发表《关于云金融的思考》、《互联网金融的发展框架与哲学思考》等 50 多篇论文。出版过《英、美、日资本市场效率比较研究》、《互联网时代证券市场的发展与监管》、《体制、货币与通货膨胀》、《智慧众筹—互联网金融早餐会》、《新金融，新生态》等多部著作。

Party Secretary of Beijing Municipal Finance Bureau, Researcher, Doctor of international finance of Nankai University, doctor of laws of Renmin University of China, Former Deputy Secretary of Beijing Municipal Financial Working Committee, deputy director of SASAC of People's Government of Beijing municipal, deputy director of Beijing Municipal Commission of Development and Reform and director of the Office of Finance. Published the Reflections on the Cloud-Finance, The Development Framework and Philosophical Reflections of the Internet Banking Framework and other more than 50 papers in the Journal of Financial Research, Economics Perspectives, the Nankai economic studies and China Banking, Wrote The Comparative Study Of British, American And Japanese Capital Market Efficiency, Development And Regulation Of Securities Market In Internet Era, System, Money And Inflation, The Wise Crowd funding-Internet Financial Breakfast and New Finance, New Ecology and other works.



李士祥
北京市常务副市长

Mr. Shixiang Li
Executive Vice Mayor of Beijing

1978 年参加工作，中央党校研究生毕业（中央党校函授学院政治学专业），工学硕士，高级政工师。北京市委常委，常务副市长。十八届中央候补委员，十二届全国人大代表。

Started work in 1978, graduated from Party School of the CPC Central Committee (majored in Politics at correspondence college of Party School of the CPC Central Committee). Master of Engineering, senior engineer, member of the Standing Committee, deputy mayor of Beijing Municipal Committee, alternate member of Eighth Central Committee and 12th National People's Congress.



李东荣
中国人民银行原副行长

Mr. Dongrong Li
Former Deputy Governor of the People's Bank of China

中央财经大学研究生毕业，经济学博士，研究员。曾任中国人民银行党委委员、副行长，国家外汇管理局党组成员，任国家外汇管理局副局长，2004年起兼任局机关党委书记，中国人民银行党委委员、行长助理。

Graduated from Central University of Finance and Economics, Doctor degree of Economics, Researcher. Former party committee member, deputy governor of People's Bank of China, Party member of the State Administration of foreign exchange, Deputy director of the State Administration of foreign exchange, Concurrently party secretary from 2004, Assistant governor of the people's Bank of China.



李伏安

渤海银行股份有限公司党委书记、董事长

Mr. Fu'an Li

Party Committee Secretary and CEO of China Bohai Bank

高级经济师，清华大学五道口（人民银行）研究生院硕士生导师。欧美同学会理事、金融委员会主任及汉弗莱学者联谊分会副会长。曾任中国银监会业务创新监管协作部主任、河南监管局党委书记、局长，中国银监会非银行金融机构监管部、信托监督管理部主任。长期在中国人民银行和中国银监会从事金融监管实践和政策研究工作。2007年8月参加中央政治局第43次学习，参与《世界金融形势和深化我国金融体制改革》专题讲解，曾参与中国银行业的多项重要监管政策、制度和标准的规划研究和设计实施。

He is a senior economist and a graduate student adviser in PBC School of Finance at Tsinghua University (Tsinghua PBCSF). He is Council Member and Director of the Finance Committee of the Western Returned Scholars Association, and Vice President of a branch of Humphrey Fellowship. He previously served as Director of Banking Innovation Supervision Department of CBRC, Party Committee Secretary and Director-General of CBRC Henan Office, and Director of the Non-bank Financial Institutions Supervision Department as well as the Trust Companies Supervision Department of CBRC. Mr. Li Fuan has been engaged in financial regulation practice and policy studies in PBC and CBRC for an extended period. In August 2007, he participated in the 43rd group study of Political Bureau of the CPC Central Committee and the lecture on Global Financial Conditions and Deepening China's Financial System Reform. He participated in the planning, study, design and implementation of a number of major regulatory policies, regulations and standards on China's banking industry.



李成才

中央电视台经济频道特别节目组主编

Mr. Chengcai Li

Editor of Special program group in CCTV Economic Channel

纪录片导演，中国纪录片协会理事，清华大学、北京理工大学教授，中国政府首届纪录片导演奖获得者，层荣获国际纪录片和中国政府新闻奖等奖项。在过去 20 年里专注金融主题，陆续制作并导演了《大国崛起》、《华尔街》、《货币》等一系列重要电视片，超过一亿人从中获得金融观念和知识的教育，对中国金融市场和与国际金融界的合作贡献重大。

Documentary director, Director of China Documentary Film Association, Professor of Tsinghua University and Beijing Institute of Technology, the winner of Chinese government's first documentary director award, Won international documentary and Chinese government news award etc. His television documentaries "The Rise of the Great Powers", "Wall Street" and "Money" focused on financial topics in the past two decades, attracted over 100 million viewers in China, who had benefited from those documentaries and learned financial knowledge and concepts.



刘明康
中国银行业监督管理委员会原主席

Mr. Mingkang Liu
Former Chairman of China Banking Regulatory Commission

中国共产党第十六届中央委员会候补委员，第十七届中央委员会委员；中国人民政治协商会议全国委员会常委、经济委员会副主任，中国银行业监督管理委员会原主席。他担任香港银行学会资深会士、曾任金融稳定理事会成员及金融稳定理事会下设的监管合作常设委员会副主席、巴塞尔银行监管委员会决策委员会成员以及马来西亚中央银行下属金融领导力国际中心董事会董事、国际金融协会副主席。2010年，中国银监会及刘明康本人被全球风险管理学会 (GARP) 授予 2009 年全球风险管理大奖。2012 年获亚洲银行家杂志终身成就奖。

Served as the first Chairman of the China Banking Regulatory Commission (CBRC). Member of the 17th Central Committee of the Communist Party of China. Deputy Director of the Committee for Economic Affairs of the National Committee of the Chinese People's Political Consultative Conference. Mr. Liu also serves as a senior fellow of Hong Kong Institute of Bankers. He was a member of Financial Stability Board (FSB), vice chairman of the Standing Committee on Supervisory and Regulatory Cooperation under the FSB, a member of the Governance Body of the Basel Committee on Banking Supervision (BCBS), and a director of the Board of International Center for Leadership in Finance (ICLIF), Bank Negara Malaysia and vice chairman of International Institute of Finance. In 2010, CBRC and Mr. Liu himself were jointly named the Risk Manager of the year 2009 by the Global Association of Risk Professionals (GARP). In April 2012, he was granted Lifetime Achievement Award by The Asian Banker Magazine.



潘功胜

中国人民银行党委委员、副行长

Mr. Gongsheng Pan

Deputy President and the Member of the Party Committee of People's Bank of China

中国人民大学经济学博士，研究员，国务院政府特殊津贴专家。曾任中国农业银行股份有限公司副行长。现任中国人民银行党委委员、副行长。央行货币政策委员会委员。2015年6月，兼任国家制造强国建设领导小组成员。

Doctor of Economics of Renmin University of China, Researcher, Expert of the State Council with special allowance, Former deputy president of Agricultural Bank of China Ltd., Deputy president and Committee member of the Party Committee of People's Bank of China, Committee member of Monetary Policy Committee. In June 2015, he has become the member of leadership team of National Industry Promotion Construction.



彭 三
天津市和平区区长

Mr. San Peng
Governor of Hepin District, Tianjin city

1987 年 10 月加入中国共产党，1988 年 7 月参加工作，在职研究生，博士学位。曾任天津市人民政府国有资产监督管理委员会副主任，河西区委副书记、区长。现任天津市和平区人民政府区长。

Joined the Communist Party of China in October, 1987, started working in July 1988, Doctor Degree, former deputy director of Tianjin Municipal People's government state owned assets supervision and Administration Committee, former deputy secretary, district mayor of Hexi District, District mayor of People's Government of Heping (Tianjin) District.



隋振江
北京市副市长

Mr. Zhenjiang Sui
Deputy Mayor of Beijing

北京市副市长，1985年参加工作，在职研究生（首都经济贸易大学企业管理专业），经济学硕士，经济师。2003 中共北京市西城区常委，区政府副区长。2006 北京市建设委员会党组书记、主任，市政府“2008”工程建设指挥部办公室党组成员、主任（兼）。2012 中共北京市委委员、海淀区委书记。

Deputy Mayor of Beijing, started working in 1985, On-job Graduate Degree (majored in Enterprise Management of Capital University of Economics), Master of Economics, Economist, District Committee and deputy District Mayor of Beijing Xicheng District; former Director and Secretary of the Party Leadership Group of Beijing Reconstruction Commission in 2006, the member and Director of Engineering department in 2008 and the member of Municipal Committee and secretary of Haidian District Committee of the CPC in 2012.



盛 溢
中国金融博物馆全球理事

Mr. Yi Sheng
Global director of Chinese Museum of Finance

目前就职于纽约 Wilson Elser Moskowitz Edelman & Dicker, LLP 律师事务所。从事研究和商业信息管理和培训工作。曾任美国纽约市立大学李曼学院助理教授。 曾经在美国 J.P 摩根投资银行资产管理部下从事市场与全球战略研究。毕业于美国福特姆大学，获经济学硕士、博士学位。纽约长岛大学信息科学硕士。在出国之前，在中国辽宁大学任经济系助教，教授金融保险课程。现为中国并购公会驻纽约代表，中国金融博物馆全球理事。

Mr. Yi Sheng currently working in Wilson Elser Moskowitz Edelman& Dicker, LLP law office in New York. Engaged in research and business information management and training. Earlier was assistant professor in the America City University of New York, Lehman College, CUNY. And did market and the global strategic research in J.P Morgan investment bank asset management (United State). Graduated from the University Fordham in United State, Master in Economics and Doctor's degree; Master in Information Science in Long island University (New York). Before going aboard, he used to be an economics assistant professor in Liaoning University (China), professor of Finance and Insurance. Currently being a representative of China Merge and Acquisition Association in New York and Global director of Chinese Museum of Finance.



唐 宁

宜信创始人、CEO
北京市网贷行业协会会长

Mr. Ning Tang

Founder and CEO of CreditEase
Chairman of the Beijing P2P Association

早年曾就读于北京大学数学系，后赴美攻读经济学。曾任职美国华尔街DLJ投资银行，从事金融、电信、媒体及高科技类企业的上市、发债和并购业务。2006年，在北京创办中国第一家P2P公司——宜信。成立以来，宜信坚持以模式创新、技术创新和理念创新，服务中国高成长性人群和大众富裕阶层。宜信始终致力于成为中国普惠金融、财富管理及互联网金融旗舰企业。

Ning Tang studied Mathematics at Peking University, Beijing, China and Economics at the University of the South in Sewanee, Tennessee. He then became an investment banker at the New York based investment bank DLJ, specializing in serving financial services and TMT companies. In 2006, Ning founded CreditEase, Chinese first peer-to-peer lending platform, in Beijing and has since then grown it into a national leader in inclusive finance and wealth management. The company provides credit solutions to small business owners, micro-entrepreneurs, salary works and rural people, through online channels as well as its offline service network covering over 180 cities and 60 rural locations. The company also provides wealth management services to Chinese mass affluent and high net worth individuals, through its wealth management centers in 40 cities.



田 薇
中央电视台主持人

M s. W e i T i a n
CCTV Moderator

中央电视台优秀主持人，达沃斯世界经济论坛“世界青年领袖”。平日主持央视日播大型国际辩论直播节目《世界观察》，辩论、讨论、专访各种形式呈现荧屏。曾深度专访联合国秘书长潘基文、前美国国务卿希拉里，及多国首脑和各界国际杰出人士等。她还在世界各地的新闻现场，时时报道评论正在发生的重大事件，其中也包括：最近在华盛顿和纽约，对中国国家主席习近平先生访美和参加联合国大会等的报道。其国际专业风格和职业素养受到国内外广泛认可。曾荣获“中国新闻奖”一等奖、“中国对外广播彩虹奖”一等奖，中央电视台年度优秀主持人等奖项；田薇曾在美担任驻华盛顿记者，是当时华盛顿唯一的一位大陆女记者。她曾深入报道伊拉克和阿富汗战争，还曾经创建中国广播史上首档英语访谈节目。进入央视后，还创办并主持“田薇跑两会”特别节目，该节目是央视英语频道首个以主持人名字命名的特别栏目。

China's leading TV anchorwoman for international broadcasting, named by the World Economic Forum as a "Young Global Leader" in 2012. Over the years, she's had exclusive interviews with various heads of states and international figures from all walks of life, such as: UN Secretary General Ban Ki-Moon, former US Secretary of State Hillary Clinton, Nobel Peace Laureates, tech pioneer Sheryl Sandberg, top level Chinese government officials and outstanding domestic and international figures from all walks of life. She has also covered some of the most important international and Chinese new events, including to Washington D.C. and New York recently for the coverage of Chinese President Xi Jinping's state visit to the U.S. and participation in the UN Sustainable Development Summit. Tian is well-known for her charming, professional and intellectual style, and has received numerous awards, including China's National Journalism AwardS, National Award for International Broadcasters, and CCTV Host of the Year. Before joining CCTV, Tian was a Washington Correspondent, the only female correspondent from China at the time. From there, she covered the wars in Iraq and Afghanistan. Tian Wei started her career as a radio executive producer & host, and founded China's first foreign language radio talk show program.



王 巍
中国金融博物馆理事长

Mr. Wang
Chairman of Chinese Museum of Finance

中国金融博物馆理事长，中国并购公会会长，万盟并购集团董事长。曾任职多家境内外金融机构。直接组织了中国几十家大型企业的改制、重组、承销及并购业务；在创新金融工具、企业重组和产业整合等领域经验丰富。王巍长期担任政府经济顾问、上市公司和金融机构的独立董事。

Founder and Chairman of China Mergers & Acquisitions Association (CMAA), Chinese Museum of Finance and Chairman of China M&A Group. Mr. Wang has organized and supervised IPO underwritings for over 40 Chinese companies in both domestic and overseas markets. He is a financial consultant on restructuring, financing, M&A and IPO for many leading companies in China. He had worked in many leading organization and corporations such as Nomura Security Co. Ltd. In Tokyo, the World Bank in Washington D.C. and the Chase Bank in New York. Mr. Wang also serves as the economic advisor for several ministerial and provincial governments in China as well as independent director on several listed companies.



魏迎宁

中国保险监督管理委员会原副主席

Mr. Yingning Wei

Former Vice Chairman of China Insurance Regulatory Commission (CIRC)

1985 年毕业于中国人民银行研究生部（现清华大学五道口金融学院），后开始从事保险工作，历任中国人民保险公司处长，办公室副主任；海南省分公司副总经理；中国人民银行保险司副司长；中国保监会人身保险监管部主要负责人，广州保监办主任，2002 年至 2011 年任中国保监会副主席。

After graduating from the Graduate School of the People's Bank of China (now Tsinghua University PBC School of Finance) in 1985, Mr. Yingning Wei started his career in insurance and has successively served as division chief and deputy office director of People's Insurance Company of China, deputy general manager of People's Insurance Company of China Hainan Branch, division chief of the People's Bank of China Insurance Division, chief of Life Insurance Supervision and Regulation Department of China Insurance Regulatory Commission, Director of China Insurance Regulatory Commission Guangzhou Office, Vice Chairman of China Insurance Regulatory Commission from 2002 to 2011.



吴晓灵
中国人民银行原副行长

M s. X i a o l i n g W u
Former Deputy Governor of People's Bank of China

中国人民银行原副行长、国家外管局原局长。1984 年中国人民银行研究生部毕业。经济学硕士学位，研究员。2008 年 3 月 5 日，在第十一届全国人民代表大会第一次会议上，当选为第十一届全国人民代表大会财政经济委员会副主任委员。2011 年 12 月 12 日，获得第十二届中国经济年度人物。2012 年 3 月，担任清华大学五道口金融学院院长。

Former Deputy Governor of the People's Bank Of China and former president of the State Administration of Foreign Exchange, Graduated from the PBC School of Finance, Tsinghua University and obtained master degree in economics, Researcher. He has been selected as the vice committee director of the 11th National People's Congress Financial and Economic Committee in the first meeting on 5 March, 2008 and won the title of the 12th China Economic Figurer of the year on 12 Dec, 2012. At present, he is the dean of PBC School of Finance, Tsinghua University in March 2012.



薛新立
天津市和平区委书记

Mr. Xinli Xue
Secretary of Heping District, Tianjin

党员，中央党校法律毕业大学文化，南开大学公共管理学院 MPA 导师。曾任共青团天津市河西区委员会副书记，天津市河西区青年联合会主席，天津市河西区少先队工委主任。现任天津市和平区委书记。

Communist, graduated from the law major of Central Party School, MPA tutor of public management department in Nankai University. Former deputy secretary of the Communist Youth League of Hexi Districts' committee, Tianjin. Chairman of Youth Federation of Hexi District, Tianjin. Director of Young Pioneers' working committee in Hexi District, Tianjin. The current secretary of Heping District.



阎庆民
天津市副市长

Mr. Qingmin Yan
Deputy Mayor of Tianjin

中国人民大学毕业，获经济学博士学位，现任中国银行业监督管理委员会主席助理、党委委员。曾担任银监会监管一部副主任、主任等职。他还是高级经济师，十一届全国政协委员，中国金融学会常务理事、享受国务院特殊津贴专家。在《金融研究》、《改革》、《管理世界》、《财经科学》、《数量经济技术经济研究》、《现代法学》、《经济理论与经济管理》、《金融时报》等国家核心期刊发表学术论文 70 余篇，学术专著 3 部，相关学术著作曾获中国哲学社会科学二等奖、中国金融学会二等奖等。

Graduated from Renmin University of China and received a doctorate in Economics. Now he is the assistant chairman of China Banking Regulatory Commission, members of the Party Group and the former deputy director and director of CBRC regulatory department. Besides, he is the Senior Economist, Eleventh Standing Committee of the CPPCC National Committee, the executive director of Chinese Finance Society and enjoying Government Special Allowance. He published more than 70 academic papers and 3 academic monographs in Finance Research, Reform, Management World, Financial science, Research on Quantitative and Technical Economics, Modern Law, Economic Theory and Management, Financial Times etc. , and he won the second award of Chinese philosophical and Social Science and the second award from China Finance Society.



赵学军

嘉实基金管理有限公司党委书记、总裁，嘉实国际资产管理有限公司董事长，嘉实资本管理有限公司董事长，嘉实财富管理有限公司董事长

Dr. Henry Zhao

Chief Executive Officer of Harvest Fund Management Co., Ltd, Chairman of Harvest Global Investments Limited, Chairman of Harvest Capital Management Company Co., Ltd, Chairman of Harvest Wealth Management Company Co., Ltd

现任嘉实基金管理有限公司党委书记、总裁，董事会董事，中共党员。拥有超过 20 年的金融管理、资本市场运作和公司治理经验。他自 2000 年 10 月起即担任嘉实基金总裁，是行业内任职期限最长的元老级 CEO。于 2005 年开创性的为嘉实基金引进了国际一流的战略合作者作为股东，有效地推进了公司治理改进和国际化业务发展。截至 2015 年年中，公司各类资产规模合计超过 6500 亿元。在加入嘉实基金之前，曾任大成基金管理有限公司副总经理，并在商品期货、商品交易所、进出口公司担任管理职位。目前还担任中国证券投资基金业协会兼职副会长、中国保险资产管理业协会专家理事。毕业于北京大学光华管理学院，获经济学博士学位。其在行为金融学与投资策略选择等方向的研究论文曾发表在《金融研究》(2001) 等期刊。

Dr. Henry Zhao is the CEO and board member of Harvest Fund Management Co., Ltd. He worked in the financial industry for over 21 years, 20 of which at Management level. Henry joined Harvest in October 2000. Under his leadership, Harvest has become one of the top asset management companies in China. Harvest managed almost USD 102.31 billion in assets as of June 30, 2015, including domestic and international business, and ranked 1st amongst joined venture fund managers and top 3 in the industry in total assets. Prior to joining Harvest, Henry was the deputy general manager of Da Cheng Fund. Before that he served in executive positions in brokerage of commodity futures and commodities exchange. He also worked in import and export industry. Dr. Henry Zhao holds a PhD in economics from Guanghai School of Management, Peking University. He is currently the Vice President of Asset Management Association of China.

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宜信公司创建于2006年，总部位于北京。成立9年以来，宜信致力于成为中国普惠金融、财富管理
及互联网金融旗舰企业，坚持以模式创新、技术创新和理念创新服务中国高成长性人群和大众富裕
阶层。目前已经在232个城市（含香港）和96个农村地区建立起强大的全国协同服务网络，通过大数
据金融云、物联网和其他金融创新科技，为客户提供全方位、个性化的普惠金融与财富管理服务。

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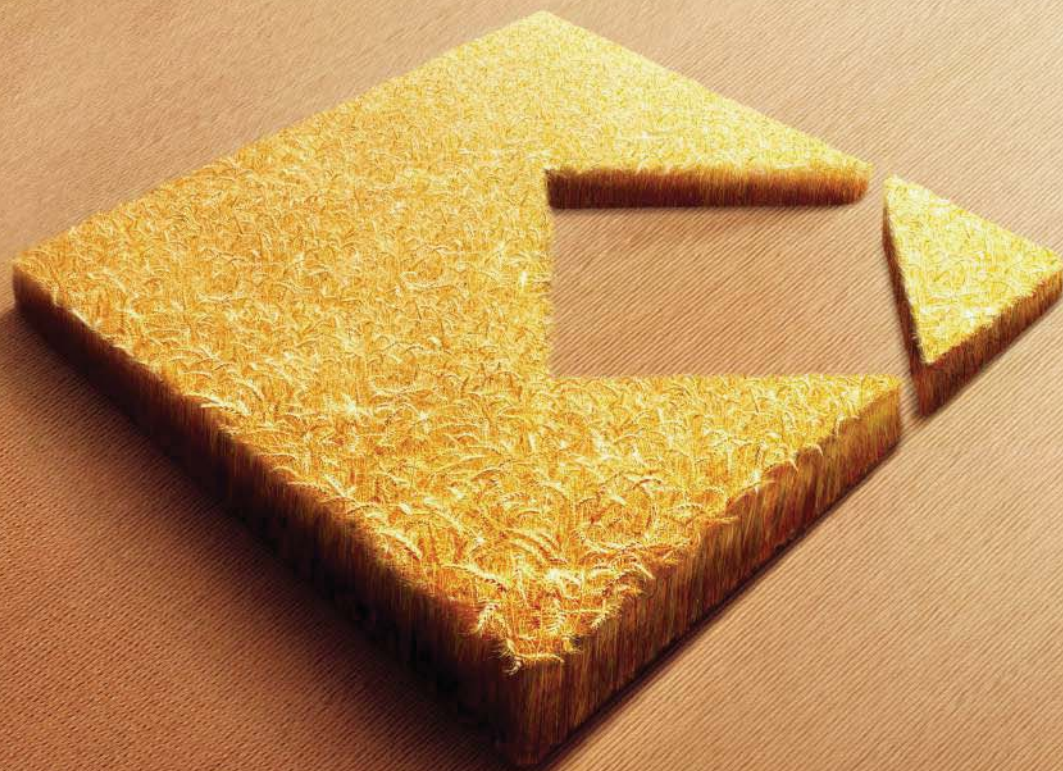
▲ 2014年3月26日，李克强总理到金融商贸开发区考察
沈阳瀚华科技小额贷款有限公司



▲ 2014年3月26日，李克强总理到金融商贸开发区考察
中国农业银行沈阳市分行

沈阳金融商贸开发区位于辽宁省沈阳市的核心区域，是全国除上海陆家嘴金融贸易区外，唯一以金融商贸为属性的开发区。被确定为国家优化金融生态改革试验示范区、东北地区金融中心核心功能区、东北最有大都市形象的总部聚集区、辽沈地区高端商贸业集聚区和沈阳中央商务区（CBD）。

目前，开发区已有 900 余家金融和金融类机构相继落户。已聚集美国毕马威等专业服务机构 360 多家，中石油东北公司等区域性公司总部近 500 家。以辽宁股权交易中心为代表的金融市场体系建设日趋完善。2014 年末，区内金融机构存、贷款余额已分别占全市的 68% 和 75%，金融业增加值占全市的比重达到 34.85%，金融业税收占全区税收比重达到 63.97%。开发区作为东北区域金融中心的载体地位和形象标志日益凸显。同时，辽宁银监局、保监局均设在开发区，中国人民银行沈阳分行、辽宁证监局也即将入驻开发区。开发区成为全省乃至整个东北的金融监管中心，也是国内外金融机构和企业总部落户沈阳的首选之地。



嘉实基金 远见者稳进

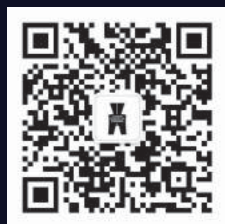
嘉实基金管理有限公司成立于1999年3月，是国内最早成立的老十家基金管理公司之一。嘉实基金首批拥有全国社保基金投资管理人、企业年金投资管理人、基金公司开展境外证券投资业务、基金管理公司特定客户资产管理业务资格和保险资金投资管理人资格，拥有基金业务“全牌照”与创新始终走在行业前列。

嘉实旗下管理2只封闭式基金、76只开放式基金及多个社保组合、专户组合和企业年金账户，共同基金产品线 and 资产管理业务种类齐全。

2010年以来，公司战略全面升级，从传统公募基金逐渐向多元化资产管理公司转型：业务发展从境内到海外、从二级市场到一级市场、从资产管理到财富管理。嘉实基金在多元化、国际化战略方面已经成为行业标杆，而坚持“以战略引领发展”，更彰显了嘉实在中国基金行业的“独树一帜”。

十六年来，嘉实基金秉承“远见者稳进”的品牌理念，依靠优秀的人才队伍、持续优秀的投资业绩、严格规范的风控管理体系，已初步建立起以资产管理为核心、具有国际影响力的财富管理集团。截至2015年年中，公司各类资产规模合计超过6500亿元。为逾两千万投资者提供专业的理财服务。

嘉实基金将继续坚持“普惠金融”理念，开展综合金融服务；坚持合作、创新、激情、卓越的企业文化，力争客户、员工和公司长期共赢发展，坚持积极践行公益，承担更大的企业社会责任；致力于打造出具有国际竞争力和品牌影响力的中国领先的资产管理机构。



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