

2024

2024 年報
ANNUAL REPORT

**Environmental
Social
Governance**



2024 年報
ANNUAL REPORT

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Preface

According to its 2025 data, Bloomberg Intelligence (BI) expects the overall profit of the global financial industry to increase by 12%-17% by 2027, due in part to the emergence of AI. While repetitive traditional jobs could be impacted, this trend marks a new milestone in the upskilling of financial talent. The financial sector is seeing an urgent demand for professionals. According to Taiwan's National Development Council, each year between 2023 and 2025, approximately 21% of the newly employed labor force have worked in the financial sector. In this context, the Taiwan Academy of Banking and Finance (TABF) plays a vital role in cultivating the next generation of fintech sector practitioners.

We are fully aware of the power of the Catfish Effect and choose to leverage it. In 2024, to strengthen Taiwan's financial competitiveness as well as local training capacity, TABF signed MOUs with the Emirates Institute of Finance (EIF) and the Central Bank of Eswatini. We will partner with EIF on fintech, asset management, Islamic finance, and more, while the Central Bank of Eswatini looks forward to learning from Taiwan's successful experience in talent cultivation and public financial education. We firmly believe these partnerships will enhance the capabilities of all parties involved.

Moreover, to advance domestic financial training and foster healthy competition within the industry, TABF has now held the Elite Awards for Taiwan Banking Excellence for twelve consecutive years. A record number of institutions participated this year with submissions, and we also introduced the Financial Inclusion Award - Anti-Fraud Initiative, highlighting financial security and inclusion. This award aligns with the central government's anti-fraud policies and serves as a benchmark



Chairman

Paul C. D. Lei

for financial well-being. The Special Contributions Award, representing the highest honor, was presented to Central Deposit Insurance Corporation Chairperson Dr. Tien-Mu Huang in recognition of his outstanding achievements in financial supervision. Additionally, FinTech Taipei 2024 adopted the theme “AI +, More than FinTech,” showcasing Taiwan’s commitment to leveraging AI to create a new force for innovation in Taiwan.

Given the increasing importance of national security, TABF teamed up with the Foundation for Defense of Democracies (FDD) of the US to host the Response Drill for Taiwan’s Financial System in The Event of Major Incidents in 2024. The drill presented three scenarios based on China’s economy and finances, to ensure we can maintain Taiwan’s first lines of defense. In response to the needs of information security and risk management, TABF jointly assembled a US Financial Resilience and Information Security Delegation with the American Institute in Taiwan (AIT) to observe and learn from crucial financial and cybersecurity institutions in the US.

TABF is also committed to promoting financial education. In 2024, we won the Best Innovation Award, Best Promotion Award, and Best Performance Award of the Financial Supervisory Commission’s Financial Education Contribution Awards, reflecting our efforts in implementing financial inclusion, and laying a solid foundation for Taiwan’s financial resilience as the sector moves toward an era of fintech innovation. Looking ahead to 2025, TABF will continue to strengthen financial education for the public and foster resilience across sectors to enhance the competitiveness and sustainability of Taiwanese industry.

President

Kao. Yi-Cheng



The 16th Board Directors and Supervisors

Date: December 31, 2024



Directors

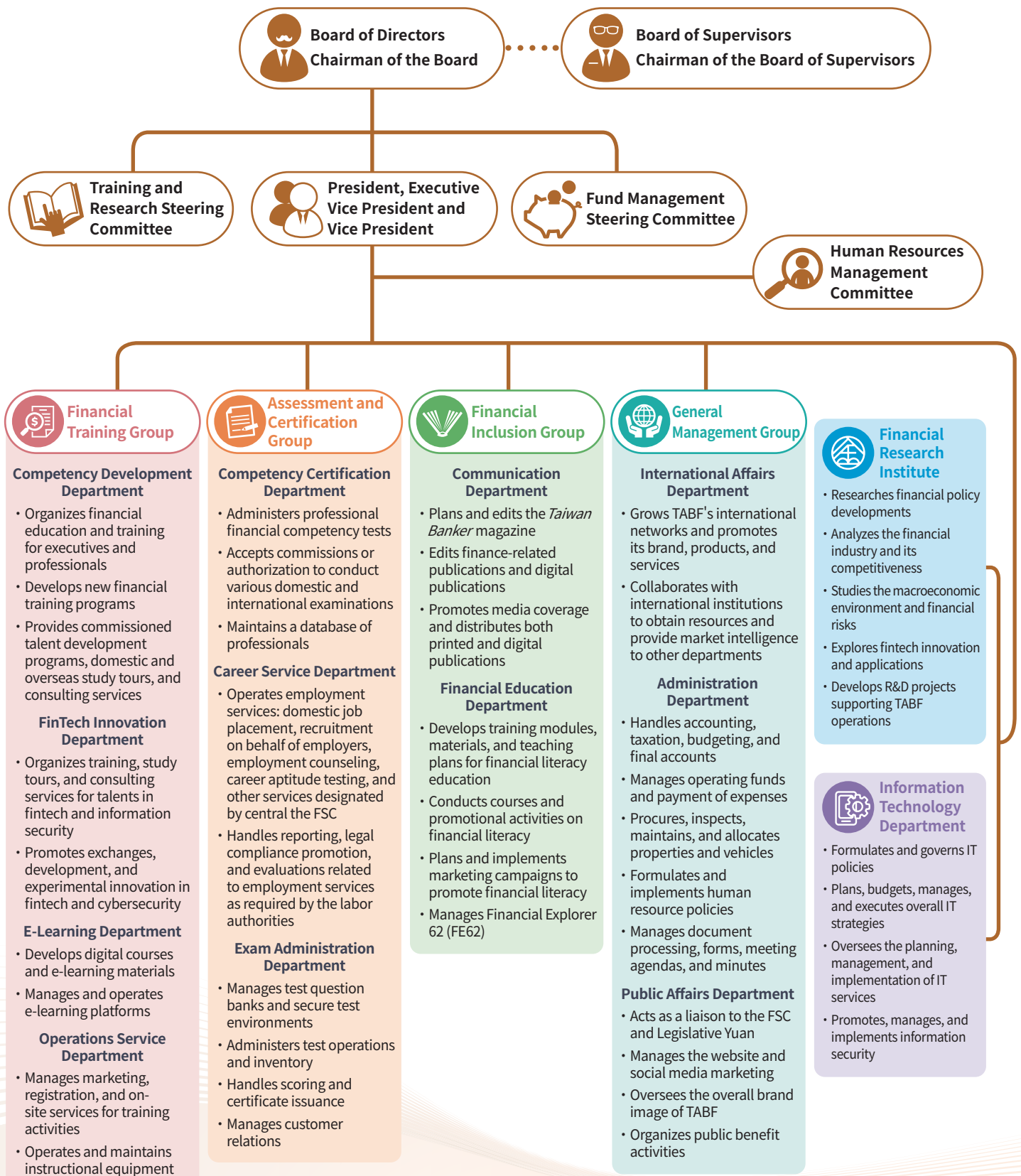
Name	Organization	Position	Representation
Paul C. D. Lei	Taiwan Academy of Banking and Finance	Chairman	Scholar/Expert
Yi-Cheng Kao	Taiwan Academy of Banking and Finance	President	Scholar/Expert
Hsou-yuan Chuang	Banking Bureau of the Financial Supervisory Commission	Director General	Director-General, Banking Bureau
Ching-Ping Kao	Securities and Futures Bureau of the Financial Supervisory Commission	Deputy Director General	FSC
Tsung-Yung Lee	Agricultural Finance Agency, Ministry of Agriculture	Director General	Director-General, Dept. of Agricultural Finance
Hue-Heng Tao	Department of Banking, Central Bank of the Republic of China (Taiwan)	Deputy Director General	Central Bank
Ray B. Dawn	Bankers Association of the Republic of China	Chairman	Chairman, Bankers Association
Jong-Yuan Ling	Bank of Taiwan	Chairperson	Banking Industry
Shi-Kuan Chen	SinoPac Holdings	Chairman	Banking Industry
Yen-Mao Lin	Taiwan Cooperative Bank	Chairman	Banking Industry
Nan-Chou Huang	E.SUN Bank	Chairman	Banking Industry
Chun-Chih Huang	Hua Nan Bank	Chairman	Banking Industry
Monica Chiou	Trust Association of R.O.C.	Chairperson	Chairperson, Trust Association
Chi-Lin Wea	R.O.C. Bills Finance Association	Chairperson	Chairperson, Bills Finance Association
Shen-Gang Mai	The National Federation of Credit Co-operatives R. O. C.	Chairman	Chairman, Credit Cooperatives Federation



Supervisors

Name	Organization	Position	Representation
Chen-Chang Tong	Financial Examination Bureau of the Financial Supervisory Commission	Director General	Director-General, Examination Bureau
Wang-Ruu Tseng	National Taiwan University	Executive Vice President	Scholar/Expert
Yih-Jiuan Wu	Department of Economic Research, Central Bank of the Republic of China (Taiwan)	Director General	Central Bank
Jie Chen	The National Federation of Credit Co-operatives R. O. C.	Chairman of Supervision Committee	Credit Cooperatives
Chun Shen Lee	Xizhi District Farmers' Association	Executive Director	Farmers' Associations

Organizational Structure







全 院 亮 點

**ORGANIZATIONAL
ACHIEVEMENTS**



2024 FinTech Taipei: AI Powers Taiwan's Next Technological Stronghold

FinTech Taipei 2024 was held at the Taipei World Trade Center from November 1–2, 2024, bringing together top domestic and international fintech leaders to witness Taiwan's financial innovation. With the theme of "AI+, More than FinTech," the event featured several zones including key fintech policy achievements, innovative financial services, fintech startup networking, and campus labs for talent development, highlighting the transformative applications of AI. A special exhibit titled "Tech Against Fraud × Finance for All" showcased how Taiwan's government uses AI and other advanced technologies to enhance account security, prevent fraud, and promote public education about fraud. The event attracted over 200 financial institutions and startups from 12 countries, and also included the 2024 FinTech Taipei Awards and Digital Sandbox Demonstration Ceremony, celebrating Taiwan's excellence in fintech applications, and promoting its fintech innovation on the global stage.

12th Elite Awards for Taiwan Banking Excellence: Reinforcing Resilience, and Championing Efforts Against Fraud

The “Elite Awards for Taiwan Banking Excellence,” launched in 2002, aims to recognize industry role models and inspire peer learning. The 12th Awards saw record-breaking participation, with 79 institutions submitting 163 entries in the institutional category. After a rigorous three-month review process – including preliminary, secondary, and final evaluations – 61 outstanding cases from 32 institutions were selected, demonstrating the industry’s commitment to excellence and resilience amid market challenges.

The “Special Contribution Award,” the highest honor, was presented to Dr. Huang Tien-Mu, Chairman of the Central Deposit Insurance Corporation, in recognition of his exceptional achievements in financial supervision and policy. Dr. Huang has long contributed to the sound development of Taiwan’s financial system and played a vital role in building resilience, leaving a profound impact on the nation’s financial stability and sustainability.

Upholding the mission of “Leading Financial Innovation,” the awards evolve with the financial environment and policy priorities. Responding to rising fraud threats enabled by evolving technologies, this year’s special “Financial Inclusion Promotion Award” highlighted anti-fraud efforts, encouraging institutions to become exemplars in fraud prevention and contributors to financial system resilience.

To enhance visibility of the award-winning initiatives, TABF launched the first-ever Elite Awards for Taiwan Banking Excellence Special Exhibition, styled as a “financial art museum,” located at the Bankers’ Salon on the first floor of its headquarters. The three-month exhibition showcased award-winning projects in financial innovation, smart services, and sustainability, demonstrating how they merge technology and human-centric design to offer safe and accessible services, and further underscoring the value of financial inclusion.



Strengthening Cybersecurity and Financial Resilience: Taiwan–U.S. Cooperation for a Stable Financial System

To bolster Taiwan’s financial resilience and capacity to handle major cybersecurity incidents, TABF partnered with the American Institute in Taiwan (AIT) to organize a U.S. Financial Resilience and Cybersecurity Delegation, which visited key U.S. agencies including the Office of Critical Infrastructure Protection and Compliance Policy (OCCIP), National Security Council (NSC), Cybersecurity and Infrastructure Security Agency (CISA), Financial Services Information Sharing and Analysis Center (FS-ISAC), American Bankers Association (ABA), Intercontinental Exchange (ICE), and New York Stock Exchange (NYSE), gaining insights into U.S. practices in cybersecurity, risk management, and defense against evolving threats. The visit laid the groundwork for future Taiwan–U.S. collaboration, and promoted joint learning on emergency response, cybersecurity, and risk control to strengthen overall financial system resilience and national security.

First-Ever “Crisis Response Simulation for Taiwan’s Financial System”

To further strengthen the resilience of Taiwan’s financial system, TABF partnered with the Foundation for Defense of Democracies (FDD) to organize a tabletop exercise on August 1-2, 2024. This simulation explored three economic coercion and financial manipulation scenarios initiated by China. Experts from Taiwan’s economic and financial sectors took part in the role-play exercise with U.S. representatives to model various





threats and responses. The exercise revealed that the economy and financial sector are the first line of defense in national security, requiring Taiwan not only to quickly counter hostile market actions, but also to ensure adequate market liquidity and enable timely response measures.

Following the exercise, TABF also met with relevant government departments to raise awareness about financial resilience, receiving strong support. To further promote the outcomes and deepen global think tank collaboration, TABF presented the results in Washington, D.C. with FDD on October 4, where policymakers, think tank experts, and journalists discussed future Taiwan-U.S. cooperation in financial resilience. The event garnered wide media coverage, both domestically and internationally.

Talent Development Partnerships with UAE and Eswatini: Expanding International Cooperation

In 2024, TABF signed Memoranda of Understanding (MOUs) with the Emirates Institute of Finance (EIF) and the Central Bank of Eswatini to foster internationalization and joint talent development.

On April 29, then-President Hank C.C. Huang signed an MOU with EIF General Manager H.E. Noura Alblooshi under the witness of H.E. Khaled Mohamed Balama, Governor of the Central Bank of the UAE. EIF, a leader in financial talent development in the UAE, will work with TABF on fintech, asset management, and Islamic finance, promoting bilateral learning and exchange.

On May 21, TABF signed an MOU with the Central Bank of Eswatini, witnessed by then-Chairman Su Jian-Rong and Governor Dr. Philemon F. Mnisi, marking the first Taiwan–Eswatini partnership in financial talent development. Eswatini aims to draw from Taiwan’s success in talent capacity-building and financial inclusion to jointly enhance professional development and financial cooperation.





2024 Taiwan Financial Lives Survey: Understanding the Financially Vulnerable

Building on surveys conducted in 2020 and 2022, TABF carried out the third Taiwan Financial Lives Survey from May to June 2024, with results announced on December 2. Partnering with Shih Hsin University's Institute for Knowledge Economy Development, Department of Finance, and Department of Social Psychology, the survey combined data analysis and in-depth interviews to assess public financial behavior, risk awareness, and financial management.

Using stratified random sampling based on regional population distribution, the survey collected 3,009 valid responses nationwide, ensuring a comprehensive understanding of regional and demographic patterns. To delve deeper into vulnerable populations' financial decisions and risk tolerance, TABF also conducted qualitative focus interviews, exploring shared behaviors and pain points, helping offer context to the quantitative findings, and highlighting gaps in financial education.

TABF will continue using these surveys to build a robust database on public financial behavior and literacy, supporting evidence-based policy and education to enhance national financial well-being and resilience.



Three National Awards to Recognize Financial Literacy Innovation, Equity, and Impact

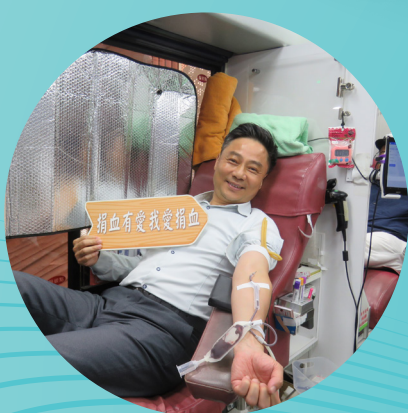
In 2024, TABF's dedication to financial literacy education earned high honors, winning the Financial Education Contribution Award from the Financial Supervisory Commission (FSC) in three categories: Best Innovation, Best Inclusion, and Best Performance. These awards validate not only its educational models, but also the tangible behavioral changes that financial literacy can bring to individuals and communities.

For new immigrant women, TABF conducted follow-up tracking and impact measurement using objective indicators. The program supported participants to build savings habits, reduce debt, and improve their financial planning. It won the Gold Award in the 2024 FSC Financial Education Contribution Awards.

In indigenous communities, TABF extended its programs to 98 tribal areas and urban gathering points. Using a “point-line-surface” strategy, it tailored anti-fraud courses for seniors, debt management for middle-aged adults, and financial planning for youth, solving real-life challenges based on cultural and lifestyle needs. This project received the Silver Award.

In elementary education, TABF developed experiential lessons incorporating the KAP model, visual tools, and playful materials to teach children about money value and financial risk. Post-course surveys demonstrated behavior changes: 41% of students who completed the lessons could evaluate purchase necessity, and 57% refrained from unnecessary spending due to cost or parental guidance. This initiative won the Bronze Award in the 2024 Financial Education Contribution Awards.







業 務 實 績

**PERFORMANCE
INDICATORS**

Strengthening Regulatory Communication Through the Regulatory Adjustment Platform

To address future environmental changes and international competition, the FSC has recognized the need for a permanent communication platform between industry, government, and academia regarding regulatory policy. As a result, it established the Financial Innovation and Regulatory Adjustment Platform, supported by four sub-working groups focusing on banking, securities & futures, insurance, and innovation. The platform aims to gather diverse perspectives on financial policies and regulations, serving as a market thermometer enabling the FSC to accelerate policy assessments and response. TABF serves as the secretariat for the platform and the banking regulatory working group. Between July and December 2024, it convened three banking group meetings and one platform-wide meeting, each attended by scholars, committee members, and regulatory officials to discuss and validate proposals. Feasible suggestions for regulatory amendments or new policy development were adopted by the FSC, while those requiring further study were referred back to proponents for revision, pending further discussion or reference by the FSC in future legislation.



Advancing Sustainable Finance Evaluation to Enhance ESG Capacity

In line with the government's Green Finance Action Plan, the FSC commissioned TABF, the Taiwan Insurance Institute (TII), and the Securities & Futures Institute (SFI) to jointly design the nation's first sustainable finance evaluation mechanism in early 2022, aiming to align the financial sector with international sustainable development trends and enhance its resilience to climate change and ESG-related risks. The initiative also seeks to synchronize the industry's sustainability strategies with national policy priorities, improve the quality of financial services, and encourage exemplary institutions to lead by example and amplify their sustainability impact. The first round of evaluations began in 2023, followed by the second round in 2024. A total of 79 financial institutions were evaluated, including 34 banks, 23 securities firms and investment trusts, and 17 insurance companies (nine property and eight life insurers). The evaluation indicators evaluated how each sector integrated ESG priorities and addressed shared and sector-specific issues.

A New Era of AI Talent Selection Through Experimental HR Tech

To modernize talent acquisition in the financial industry, TABF launched the HR Tech Innovation Experiment, integrating AI, big data, and digital technology to overhaul the recruitment process, improving efficiency, accuracy, and fairness. The first milestone of the project was the development of an AI-powered resume screening system which uses machine learning and intelligent algorithms to identify candidates who best match the job requirements, significantly

improving selection accuracy and speed. Additionally, TABF introduced a gamified assessment model to evaluate critical competencies such as risk preference, numerical skills, and logical thinking through interactive simulations. To further enhance evaluation precision, the project incorporated an AI virtual interviewer leveraging voice recognition, emotion analysis, and natural language processing to generate comprehensive assessment reports to support better hiring decisions. Looking ahead, TABF will work with financial institutions to expand its video resume database, optimize AI talent matching models, and build a more intelligent, customized, and efficient recruitment system.

Tracking Digital Transformation: 2024 Bank Innovation Survey

Since 2022, TABF has conducted a biennial survey on fintech innovation and digital transformation across Taiwan's banking sector. The methodology includes questionnaires, a Digital Transformation Return On Investment (DTROI) matrix, and expert interviews. Based on resource investment and transformation performance, banks were categorized as "leaders," "actives," "potentials," or "conservatives." Comparing the results from 2022 and 2024, the leaders maintained their competitive edge, while some conservatives progressed to potential status. Over 90% of banks had adopted AI technologies, and 80% had initiated generative AI pilots. Focus areas shifted from payments and cybersecurity to anti-money laundering, fraud prevention, and robotic process automation. Over the next three years, banks are expected to prioritize cybersecurity, generative AI, and cloud computing. The study also found that demand remains high for strategic planning and cross-disciplinary fintech talent. AI development, cybersecurity, and cloud skills are in particularly strong demand. TABF conducted in-depth analysis of the challenges faced by different types of banks and offered strategic guidance. Recommendations included cautious investment for conservatives, talent development for potentials, improved cross-department collaboration for actives, and customer-centric ecosystem building for leaders. TABF hopes these findings will assist banks to develop forward-looking digital strategies and propel Taiwan's financial industry toward comprehensive transformation and modernization.

Current affairs commentaries published:

101

Media interviews and citations:

133

Forums, seminars, and project-based symposiums held:

9



Upskilling for the Financial Industry: Internationally-Oriented Professional Training

To enhance Taiwan's global competitiveness and in financial services, TABF has continued to implement international initiatives including the Leading Executive Apex Program (LEAP), the International Talent Development Program (ITDP), and various overseas study missions. These programs aim to cultivate high-level talent, strengthen operational resilience, and foster international alignment to address global financial challenges and sustainability transitions.

The LEAP Program, jointly organized by TABF and the Bankers Association of the Republic of China (BAROC) since 2011, focuses on leadership, strategy, and sustainability. It equips senior managers with agile transformation thinking to navigate change and stimulate organizational growth. To date, 14 cohorts of 465 participants have completed the program, many of whom have gone on to lead teams to advance forward-looking innovations.

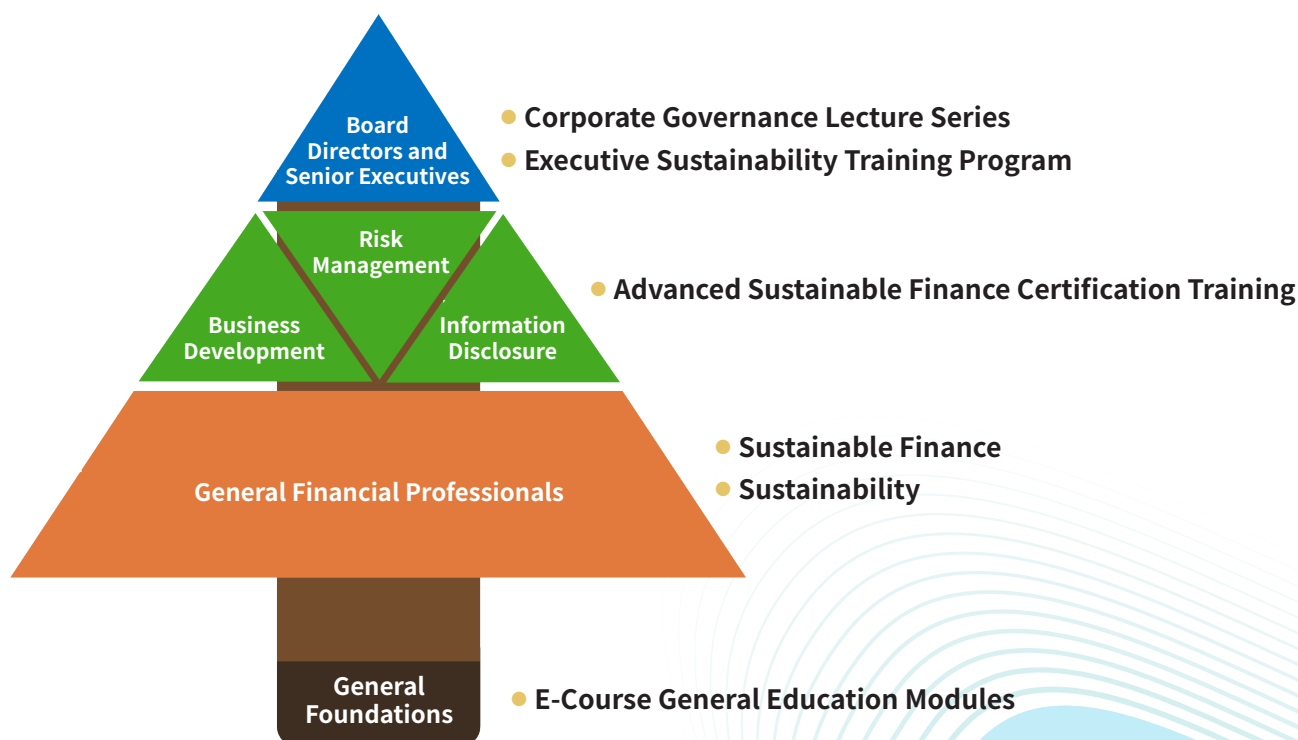
The ITDP combines interactive group discussions with thematic reports led by domestic and international experts. This year's overseas study trip was held in Vietnam, where visits to financial institutions and industries prepared participants for future leadership roles in overseas branches through immersive learning and cultural exchange.

Sustainability Competencies and Financial Resilience

TABF provides comprehensive training in ESG and sustainable finance for financial personnel at all levels. For board members and senior executives, it offers the Corporate Governance Lecture Series, covering key topics such as disclosure frameworks and international developments like TNFD. In 2024, the Sustainability Competency Series featured workshops to deepen practitioners' ESG knowledge and support financial institutions in their transitions toward sustainability.



Sustainable Finance Curriculum Framework – TABF



To further institutionalize sustainable finance and accelerate Taiwan’s net-zero transition, TABF, the Taiwan Insurance Institute, and the Securities & Futures Institute jointly developed a Sustainable Finance Certification program with both basic and advanced levels. This initiative enhances ESG expertise and supports financial professionals to build long-term sustainability capacity.

In response to the FSC’s Green Finance Action Plan 3.0, TABF again partnered with BAROC and the European Chamber of Commerce Taiwan (ECCT) in 2024 to host the ESGRF Green Finance Leaders Roundtable Forum. Domestic and international experts were invited to share insights on practical actions the financial sector can take to advance net-zero strategies and enhance institutional resilience.



Skills Diversification and Upgrade

Since 2020, when the FSC allowed banks to offer wealth management services to high-net-worth individuals (HNWIs), TABF has supported this initiative by offering the HNWI Training Program, which trains investment and advisory professionals for clients with assets exceeding NT\$100 million. In 2024, TABF collaborated with the Wealth Management Institute (WMI) of

Singapore to launch the HNWI Investment Products and Resilience Development Program (HIRDP). Incorporating practices from Singapore and Hong Kong, the program aims to strengthen financial institutions' capacity to design customized financial products and cultivate specialized HNWI product talent.

TABF also offers FinTech Talent Certification Programs, helping institutions set clear standards for hiring and upskilling. The FinTech Certification Mechanism Report outlines a framework for training and certification. Nine professional subject areas are offered in modules ranging from 5 to 42 hours, incorporating both traditional lectures and practical exercises.

The Cybersecurity Leadership Development Program helps senior cybersecurity officers to stay abreast of tech trends and enhance their strategic planning. The program focuses on five core competencies – strategic planning, trend analysis, resource integration, team management, and crisis handling – and is structured around three major themes: cybersecurity governance, change management, and cyber resilience. Six cohorts were trained in 2024, with a total of 145 participants. The program continues to reinforce collective defense, deepen industry-wide cybersecurity expertise, and elevate the overall resilience of Taiwan's financial sector.



Professional Training Programs Conducted:

2,639 classes **177,177** participants

International Finance Training Programs Conducted:

83 classes **6,476** participants

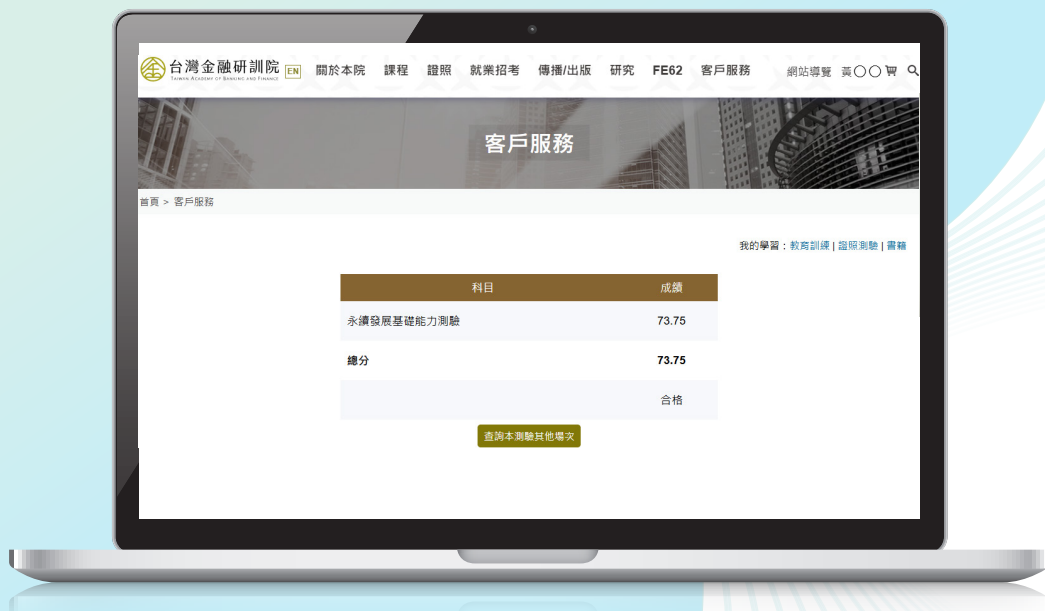
Finc Virtual Assistant for Seamless Online Learning

To enhance the learning experience, TABF's FinCourse platform introduced the Finc Virtual Assistant, an intuitive online support system offering chat-based help and quick access to resources. This AI-powered assistant helps learners resolve issues in real time, ensuring a smooth and uninterrupted digital learning journey. Beyond offering high-quality content, FinCourse is committed to zero-delay, round-the-clock learning assistance.

Promoting Sustainability and Optimizing the Learning Environment

To support sustainability and reduce paper usage, TABF began digitizing course materials in 2023. Digital handouts now replace printed ones, making content more accessible. Additional floor outlets have been installed in classrooms to ensure that laptops and devices can remain powered throughout training. More outlets were also added in break areas to maintain learning efficiency without interruption. These improvements enhance both convenience and learning continuity, while reducing the environmental footprint. Through such initiatives, TABF provides high-quality learning resources and contributes to a smarter and greener future.





New Financial Certification Initiatives: Advancing Sustainability and Digital Transformation

In alignment with the 2050 Net-Zero Transition goal and the FSC's Green Finance Action Plan 3.0, TABF collaborated with the Securities & Futures Institute of the Republic of China and the Taiwan Insurance Institute to jointly launch the Basic Test on Sustainable Development, aimed at enhancing financial professionals' sustainability competencies and promoting the green transformation of Taiwanese finance.

Adhering to ESG principles of sustainable corporate operation, TABF continues to promote paperless certification. Test-takers now receive their results directly on-screen after completing computer-based exams, and score reports are available for online viewing and download, significantly reducing paper usage. In addition, electronic signatures are being introduced to digital certificates, strengthening certificate authentication, and eliminating the inconvenience of managing or reissuing physical copies, thus accelerating the digital, intelligent transformation of financial certification issuance.



Diversification of Recruitment: Expanding Service Coverage

To attract more outstanding talent to the financial sector, TABF has expanded beyond traditional written and oral assessments. New options include document-based evaluation, replacing written tests with the Financial Industry Competency Mapping Test (FIT), and posting job opportunities through FinTalent, allowing partner institutions to choose from multiple customized recruitment solutions. While the program initially served public banks, it has since expanded to private banks such as Bank of Shanghai, Entie Commercial Bank, Bank of Panhsin, and Taichung Bank.

To further improve recruitment precision, TABF is developing supportive tools and continuously optimizing test content and data analysis models to enhance the accuracy and practical value of these



Certification Examinations
Administered:

124,020
candidates

Employment Screening
Administered:

50,429
candidates

assessments. When candidates from diverse backgrounds can showcase their strengths through fair and objective evaluations, this fosters diversity and inclusion in recruitment. For example, TABF has revised the Financial Talent Character Test to align job roles and traits with the evolving demands of the modern financial industry. In parallel, TABF has launched the HR Tech Project, which uses AI-powered data analytics and predictive technologies to boost recruitment accuracy and streamline hiring in response to the dynamic challenges faced by the financial industry.

Refinement of Operational Procedures to Enhance Examinations

To improve service quality and customer satisfaction, TABF has continuously refined its test administration processes. Enhancements to the computer-based testing interface include improvements to color schemes, font types and sizes, button icon size and placement, and the addition of illustrated system operation guides to ease test anxiety for first-time users. TABF also consolidated test sessions with identical time slots into single sittings to optimize venue utilization and increase exam capacity. For the mass renewal of the Senior Financial Planning Consultant Certificate, TABF proactively sent renewal notifications with direct online application links, streamlining the process, improving user convenience, and boosting overall efficiency. TABF's efforts in test administration have been recognized by the Taipei City Department of Labor, which has awarded it an A-grade rating in its evaluation of private employment service agencies for four consecutive years. TABF will continue to optimize its processes and maintain exceptional service quality, contributing to a more stable and better-functioning employment market.

台灣金融研訓院專業能力測驗電腦化成績單 (續上列)

姓名	張○○	八碼號碼	9810501212101111
測驗日期	2020-10-25	應考證書號碼	912111111111
測驗類別	財政部委託人才培訓及專業人才測驗		
測驗科目	專業	測驗結果	合格
得分率	85	總分	85
及格標準	80		
備註	1. 本測驗係由財政部委託人才培訓及專業人才測驗中心辦理。 2. 本測驗係由財政部委託人才培訓及專業人才測驗中心辦理。 3. 本測驗係由財政部委託人才培訓及專業人才測驗中心辦理。		

財政部委託人才培訓及專業人才測驗中心



 台灣金融研訓院
TAIWAN ACADEMY OF BANKING AND FINANCE

您好：

您已於規定內完成本院辦理之「高齡金融規劃顧問師」在職訓練課程至少 12 小時，請點選信件連結申請換發「高齡金融規劃顧問師資格測驗(第 1 期)」新效期證書或可至台灣金融研訓院網站【[登錄](#)】→【[考生常用服務](#)】→【[更多考生服務](#)】→【[證照測驗](#)】→【[證照換發](#)】→【[證照測驗證書\(新效期\)](#)】→【[申請成立、等待審核](#)】，完成申請程序。

未完成申請程序者，恕無法辦理換證。

台灣金融研訓院敬啟

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其它更詳細的相關資訊可進入網站查詢 <https://www.tabf.org.tw>

此郵件由系統自動發送，請勿直接回覆

Taiwan Banker
Circulation:

43,323 magazines

Media Citations:

761 times

New Book:

17 titles

Total Book Distribution:

22,353 copies



Professional Publications: Enhancing Financial Expertise

In line with market trends, TABF continues to strengthen the dissemination and application of financial knowledge by developing new professional publications, including Comprehensive Retirement Planning and Insurance, the Family Trust Planning Consultant Manual, Senior Financial Planning Consultant Manual, Overview of Banking Internal Control and Audit Regulations, Banking Internal Control and Audit, and Introduction and Practice of Derivatives. These resources aim to elevate the capabilities of financial professional in response to an evolving financial environment.

TABF also publishes the *Taiwan Banker*, the leading professional financial magazine in Taiwan, which covers a wide range of topics across banking, insurance, and securities. With a global outlook, the magazine analyzes domestic and international socio-economic and industry developments, features interviews with



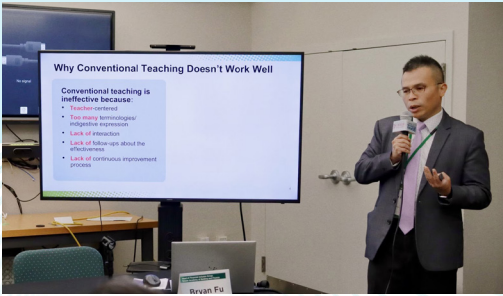
key figures in government, academia, and business, and promotes financial inclusion concepts and strategies, helping align Taiwan's financial discourse with global trends.

“Fin-Comedy” Videos: Engaging the Younger Generation

In 2024, TABF expanded its financial literacy outreach by translating *Taiwan Banker* content into digital-native video formats. Through street interviews, comedy skits, and infotainment segments, they deliver content on topics including financial inclusion, fraud prevention, workplace trends, smart money management, employee benefits, and the pet economy in creative and relatable ways.

This year marked TABF's first collaboration with local comedy troupe “People Person Comedy,” producing duologue videos that presented financial literacy in a lively and humorous way. These videos achieved the highest views and most positive feedback on the channel to date, significantly expanding public engagement.





CSR Partnerships: Three Banks Promote Financial Education in Elementary Schools

TABF's CSR Financial Well-being Public Benefit Project expanded further in 2024, adding two new partner banks. TABF collaborated with Chang Hwa Bank, Hua Nan Bank, and Mega Bank to deliver financial education in schools across Changhua, Tainan, and Kaohsiung. As of 2024, 172 bank employees have served as "CoCo Volunteer Teachers," conducting 1,206 class sessions to teach 30,045 students, greatly extending the reach and depth of financial literacy education.

Women's Empowerment in Finance: Taiwan's Inclusive Finance is Going Global

In support of the United Nations' financial inclusion goals, TABF was recognized by the Ministry of Foreign Affairs and invited to participate in a parallel event during the Commission on the Status of Women (CSW) in New York in March 2024. At this international forum, TABF shared Taiwan's experience in women's financial empowerment. The delegation joined seven events, including forums hosted by women's associations, the Ministry of Foreign Affairs' Women's Empowerment Night, and TABF's own session. Through exhibitions and dialogue, the delegation showcased Taiwan's financial inclusion achievements and participated in discussions on global poverty reduction. TABF shared its strategies for financially empowering rural women through education, highlighting Taiwan's success promoting women's financial autonomy.

**Banks Participating
in CSR Financial
Well-being Public
Welfare Project:**

3

**Bank
Volunteers:**

172

**Financial Knowledge
Outreach Events Held:**

1,093

**Event Participants Reached:
approx.**

35,820

FE62: A Hub for Learning and Exchange

“I didn’t know financial education could be this fun!” – a common reaction from visitors after touring the Financial Explorer 62 (FE62), Taiwan’s first financial museum. Since its opening in December 2022, FE62 has hosted over 140 groups and welcomed more than 3,600 visitors. In 2024, FE62 continued its role as a platform for international financial education exchange, receiving delegations from Macau, Hong Kong, Germany, and Eswatini.

FE62 attracts learners of all levels and serves as a bridge for international dialogue. During a December 4 visit by the YMCA of Macau, TABF presented insights on financial literacy models and instructional strategies. In Macau, financial education is led by social welfare agencies and focuses on students, while in Taiwan, it is promoted by the FSC in collaboration with the financial industry and targets adults and diverse communities.





Upholding the vision of “Connecting Globally, Creating Value Together,” TABF has consistently promoted international talent exchange and collaboration in finance, enhancing the adaptability and competitiveness of Taiwan’s financial industry, and strengthening its global influence.

Global Partnerships and Professional Dialogue

As the Secretariat of the Asian-Pacific Association of Banking Institutes (APABI), TABF actively fosters cooperation among banking and finance institutes across the Asia-Pacific region. In 2024, TABF co-organized the 21st APABI Biennial Conference and launched the APABI E-Newsletter Editorial Committee, creating a platform for knowledge exchange. Core discussion topics included digital innovation and security, sustainable finance, financial inclusion, and regulatory development. These collaborations promote regional financial stability and elevate Taiwan’s presence in Asia-Pacific financial ecosystems.

International Collaboration and Dialogue

In 2024, TABF signed Memoranda of Understanding with the Emirates Institute of Finance (EIF) and the Central Bank of Eswatini (CBE) to establish partnerships in financial talent development and research. These

initiatives lay a solid foundation for transnational cooperation in Taiwan’s financial sector.

TABF also launched the TABF Connect International Salon, a platform for exchange among foreign financial institutions, international professionals, and Taiwan’s financial sector. The salon encourages exchange of global perspectives and sparks innovation and collaboration.

Organizational Resilience for Steady Progress

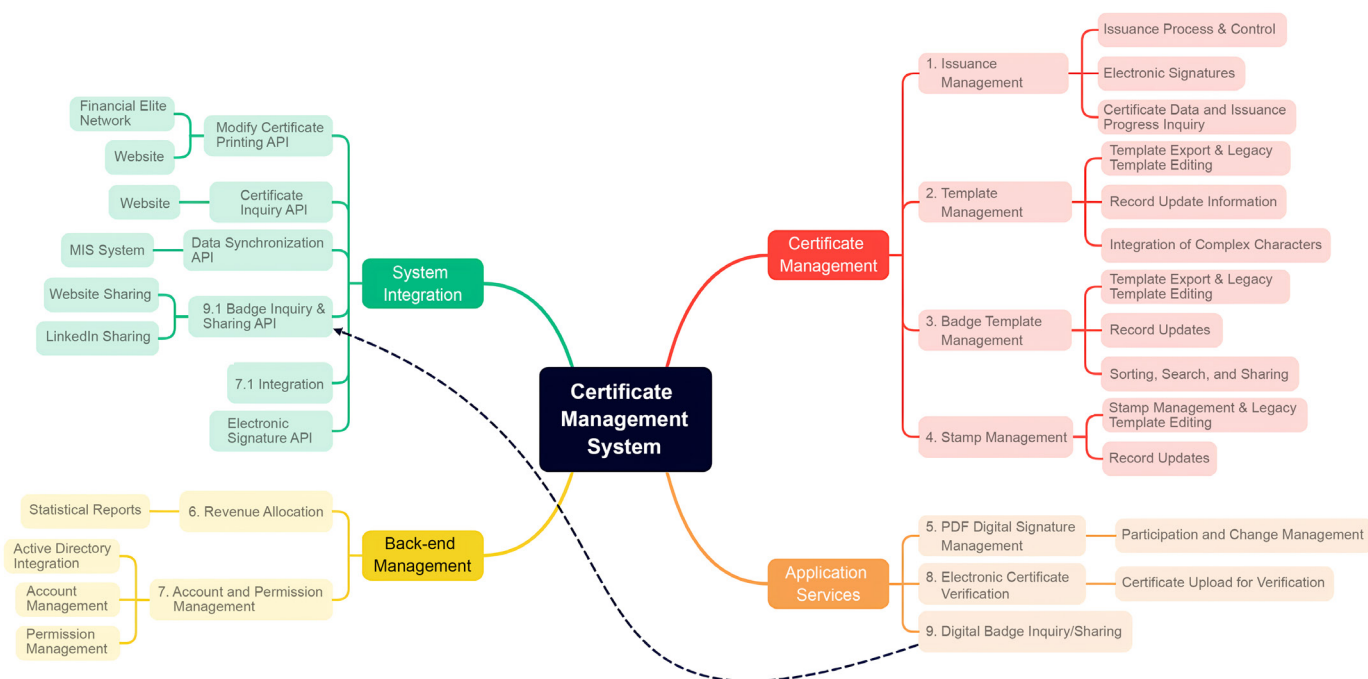
In order to improve employee well-being, TABF has streamlined management processes, and implemented diverse resilience-building initiatives, helping it respond flexibly to change while ensuring stable development.

In terms of staff care and benefits, TABF continues to implement the Employee Assistance Program (EAP) with monthly promotional activities. In 2024, it also provided each employee with three free professional counseling sessions and introduced guidelines for the Prevention and Handling of Workplace Bullying, ensuring proper role fit and a safe, friendly work environment. TABF remains dedicated to the principle of “Resilient Response, Steady Progress,” aiming to enhance organizational resilience and jointly embrace future challenges.

Carbon Inventory and the 2030 Emissions Reduction Target

In response to climate change and the financial sector’s carbon reduction trend, TABF initiated a voluntary carbon inventory. A kick-off meeting and training were held on February 23, 2024, in collaboration with a consulting firm. The inventory process was conducted in accordance with ISO 14064-1:2018 and the GHG Protocol, and was successfully completed in September through the collective effort of all staff.

Based on the 2023 baseline data, TABF plans to reduce its Scope 1 and Scope 2 greenhouse gas emissions by 23% by 2030. Measures include replacing HVAC systems with energy-saving units and upgrading to regenerative elevators, demonstrating corporate social responsibility and contributing to Taiwan’s 2050 net-zero vision.



The Information Technology Department actively supported TABF's digital transformation in 2024, prioritizing cybersecurity and data privacy in addition to helping departments improve efficiency, innovation, and service quality. These projects lay the foundation for TABF's stable development and ensure a secure, high-quality experience for both staff and clients.

Zero Trust: Enabling a Secure and Flexible Work Environment

TABF launched its mobile office initiative in 2023, and in 2024, it implemented the Zscaler Zero Trust platform to enhance security and mobile work capabilities. The platform's globally distributed node architecture greatly improves performance and eliminates the single-point-of-failure risk associated with traditional VPNs. Staff can securely access internal systems and data from anywhere. Zscaler's advanced features include real-time defense against phishing and malware, data encryption, and segmentation technologies to protect information and privacy. The platform also allows for adaptive security policy updates to meet complex business demands, strengthening both operational efficiency and cybersecurity, and delivering a secure and convenient working environment.

Digital Certificates: Promoting Sustainability and Administrative Efficiency

To improve certificate management, TABF launched a digital certificate platform in early 2024, integrating needs and resources across departments. This initiative reduces reliance on paper-based certificates, enhances administrative efficiency, and supports sustainable practices. Digital certificates conveniently enable immediate access to users, eliminating the delays associated with physical issuance. Efficient data management also reduces the time and cost required for storage, retrieval, updates, and maintenance. In addition to lowering printing and mailing costs, they reduce paper usage, supporting environmental sustainability. This system has significantly improved certificate management efficiency and security while offering customers a more convenient and eco-friendly option.

Finance with Love: Ending Blood Shortages

Beyond promoting financial development and financial inclusion, TABF actively works to enhance societal resilience and fulfill its Corporate Social Responsibility (CSR). Since 2011, TABF has partnered with the Taipei Exchange (TPEX), Taiwan Futures Exchange (TAIFEX), and the Taipei Blood Center to jointly organize the annual “Finance with Love: Ending Blood Shortages” blood donation campaign. This initiative seeks to leverage the strength of the financial industry to support the healthcare system and give back to society. In 2024, the event expanded significantly, bringing in the Taiwan Clearing House as a co-organizer for the first time. The campaign was held in collaboration with 14 local bank branches and the Dingdong Village Office, garnering widespread support.

Held at two venues – TABF’s headquarters and the Nanhai Road Blood Donation Center – the campaign attracted 356 participants and collected 462 bags of blood, totaling 115,500 c.c., marking a notable increase from the previous year. These results highlight the financial industry’s strong commitment to public benefit and meaningful societal impact.

Looking ahead, TABF will continue promoting the initiative, encouraging more financial institutions and members of the public to join and spread warmth across communities.

Disability-friendly “Love Learning”

TABF’s “Love Learning” online lecture series delivers professional financial education through livestreamed multimedia content, inviting experts from across Taiwan to present insights on financial topics. Since 2022, the sessions have been made available via the Love Learning e-course platform to ensure continuous accessibility. In 2024, the series covered a total of seven topics, serving 2,771 participants: the practical considerations and trends of generative AI in the financial industry, the effects of Housing Tax 2.0 on personal asset allocation and the market, competition dynamics and prospects within the tech industry, interpretations of global macroeconomic trends, practical discussions on Property and Land Tax 2.0 in relation to equity planning, inheritance, and joint property development, the sustainable finance ecosystem, and real-world case studies on fraud prevention in financial institutions. TABF remains committed to promoting the spirit of lifelong learning, and advancing shared prosperity together with society.

**Total Participants
in Activities:**

over

2,200

**Total Blood Donations
Collected:**

over

2,600 bags

**Total Volume of Blood
Donated:**

over

651,500 c.c.





附 表

APPENDIX

BLANCE SHEET

December 31, 2024 & December 31, 2023

Unit : NT\$1,000

		December 31, 2024		December 31, 2023	
Item		Amount	%	Amount	%
Assets	Current Assets	1,216,906	44.75	1,157,256	46.33
	Fund & Investment	808,358	29.72	654,061	26.19
	Real Estate, Plant and Equipment	674,022	24.78	663,004	26.55
	Intangible Assets	14,884	0.55	18,589	0.74
	Other Assets	5,330	0.20	4,703	0.19
	Total	<u>2,719,500</u>	<u>100.00</u>	<u>2,497,613</u>	<u>100.00</u>

		December 31, 2024		December 31, 2023	
Item		Amount	%	Amount	%
Liabilities	Current Liabilities	211,693	7.78	176,747	7.08
	Other Liabilities	50,197	1.85	38,393	1.54
	Fund and Surplus	2,457,610	90.37	2,282,473	91.38
	Total	<u>2,719,500</u>	<u>100.00</u>	<u>2,497,613</u>	<u>100.00</u>

INCOME STATEMENT

Years Ended December 31, 2024 & 2023

Unit : NT\$1,000

	December 31, 2024		December 31, 2023	
Item	Amount	%	Amount	%
Operating Income	726,185	100.00	658,136	100.00
Operating Expenses	723,369	99.62	646,715	98.26
Operating Surplus	2,816	0.38	11,421	1.74
Non-Operating Income	95,755	13.19	84,171	12.79
Non-Operating Expenses	1,083	0.15	1,036	0.16
Non-Operating Surplus	94,672	13.04	83,135	12.63
Surplus for the Year (pre-tax)	97,488	13.42	94,556	14.37
Income Tax	3,775	0.52	3,918	0.60
Surplus for the Year (after-tax)	93,713	12.90	90,638	13.77

Research In 2024

Commissioned Research	
1	Real estate market outlook: Opportunities and challenges for banks
2	Sustainable finance assessment in 2024
3	Financial advice white paper in 2024
4	A feasibility study on the expansion of banking operations through private debt businesses
5	Financing strategy for climate change and low-carbon transformation
Self-initiated Research	
1	Research on supply and demand of key talents in banking industry in 2023
2	Survey on gender equality at the banking sector in 2024
3	Strengthening the Taiwan Financial System's Crisis Response Capability
4	The Impact of Introducing the New Generation Solvency System (TW-ICS) on the Life Insurance Industry in Taiwan and Recommendations for Response
5	Research on supply and demand of key human resources in banking industry in 2024
6	Why Taiwan should actively expand its network of international financial organizations and an analysis of Taiwan's strategy for participating in the IMF

7	Forward-Looking Outlook on Net-Zero Finance and Policies
8	Transforming Taiwan as the Asian Asset Management Center
9	Analysis of the international regulatory strategy for virtual assets
10	Research on cross-border finance
Innovative Research Projects	
1	HR Tech Innovation Experiment Project
2	Survey on Fintech Innovation and Digital Transformation in Taiwan Banking Industry in 2024
3	Wealth management service for High Net Worth Individuals
4	Capability Building Project to realize Fintech Development Roadmap (2.0)

Financial Training Events and Enrollment in Previous Years

Year	Number of Sessions	Whole Year Enrollment
1981-1989	618	34,158
1990-1999	3,076	148,024
2000-2005	5,950	246,557
2006	1,242	55,631
2007	1,544	64,942
2008	1,666	83,009
2009	1,640	73,797
2010	1,474	63,830
2011	1,451	60,795
2012	1,558	60,355
2013	1,717	97,912
2014	1,767	69,959
2015	1,987	91,618
2016	2,212	93,937
2017	2,632	119,075
2018	2,555	302,987
2019	2,543	112,462
2020	2,310	115,159
2021	2,224	134,628
2022	2,140	158,173
2023	2,574	169,370
2024	2,639	177,177
Total	<u>47,519</u>	<u>2,533,555</u>

	Number of Sessions	Whole Year Enrollment
2024 In-person	1,679	73,116
2024 Online	660	82,371
2024 E-course	300	21,690
Total	<u>2,639</u>	<u>177,177</u>

Pencil-based Professional Ability Tests in 2024

Test Name	Registrations
Proficiency Test for Trust Operations Personnel	4,343
Certificate for the Subject Test-Laws and Regulations on Trust Businesses	25
Proficiency Test for Bank Internal Control and Audit	2,184
Basic Test on Financial Markets and Professional Ethics	9,250
Basic Proficiency Test for Bank Lending Personnel	1,746
Advanced Proficiency Test for Bank Lending Personnel	189
Basic Proficiency Test for International Banking Personnel	2,701
Proficiency Test for Financial Planning Personnel	600
Basic Proficiency Test for Financial Risk Management	561
Proficiency Test on Foreign Exchange Trading	273
Certification Test for Financial Derivatives Sales Personnel	3,179
Basic Test on the FinTech Knowledge	1,743
Professional Exam for Anti-Money Laundering and Countering Terrorism Financing Specialist	2,934
Certification Test for Eldercare Financial Planning Consultant	4,420
Certification Test for Family Trust Planning Consultant	2,769
Basic Test on Sustainable Development	3,718
Total	<u>40,635</u>

Computer-based Proficiency Test in 2024

Test Name	Registrations
Proficiency Test for Trust Operations Personnel	20,079
Certificate for the Subject Test-Laws and Regulations on Trust Businesses	165
Proficiency Test for Bank Internal Control and Audit	15,106
Proficiency Test for Bank Internal Control and Audit (English Version)	22
Proficiency Test for Debt-Collection Personnel	1,671
Proficiency Test for Financial Planning Personnel	2,897
Basic Proficiency Test for Bank Lending Personnel	7,707
Basic Proficiency Test for International Banking Personnel	7,812
Certification Test for Financial Derivatives Sales Personnel	12,760
Basic Proficiency Test for Financial Risk Management	1,966
Basic Test on the FinTech Knowledge	7,867
Total	<u>78,052</u>

Fundamental Integrated Test for Banking and Finance in 2024

Test Name	Registrations
Subject I (Accounting & Monetary Economics)	2,522
Subject II (Negotiable Instruments Act & Banking Act)	2,811
Total	<u>5,333</u>

International Certificate Test in 2024

Test Name	Associated Agencies	Notes
Certified Financial Planner and Associate Financial Planner	Financial Planning Association of Taiwan	Total: 2,291 examinees

Publications and Promotions in Previous Years

Year	New Titles Developed	Number of Copies Published		
	Categories	For Test Reference	Others	Total
1981-1999	143	34,000	1,033,600	1,067,600
2000-2004	97	697,400	380,950	1,078,350
2005-2009	152	250,802	274,451	525,253
2010	27	46,472	43,452	89,924
2011	27	28,552	42,176	70,728
2012	28	32,946	36,751	69,697
2013	31	16,151	49,213	65,364
2014	33	22,248	56,554	78,802
2015	29	22,361	51,765	74,126
2016	30	24,406	42,837	67,243
2017	27	25,803	37,455	63,258
2018	20	42,855	33,471	76,326
2019	20	24,488	44,963	69,451
2020	18	24,015	34,730	58,745
2021	16	30,930	6,882	37,812
2022	18	19,493	7,560	27,053
2023	17	18,032	10,948	28,980
2024	17	13,947	8,406	22,353
Total	<u>750</u>	<u>1,375,901</u>	<u>2,196,164</u>	<u>3,572,065</u>

Year	Financial Education Promotion	
	Sessions	Promotions
2018	61	29,945
2019	129	31,526
2020	134	19,621
2021	257	14,153
2022	290	12,692
2023	800	24,389
2024	1,093	35,820
Total	<u>2,764</u>	<u>168,146</u>

Major Events in 2024

JANUARY	<ul style="list-style-type: none"> • Implementation of TABF's organizational restructuring • Held the 11th Financial Industry Competency Mapping Test and the 1668th–1673rd sessions of the Basic Test on Financial Markets and Professional Ethics • Co-hosted the 15th ACAMS Annual AML & Anti-Financial Crime Conference with the Association of Certified Anti-Money Laundering Specialists (ACAMS)
FEBRUARY	<ul style="list-style-type: none"> • Hosted the inaugural Sustainable Finance Evaluation Awards Ceremony • Held the 1674th–1679th sessions of the Basic Test on Financial Markets and Professional Ethics
MARCH	<ul style="list-style-type: none"> • Held the 12th Financial Industry Competency Mapping Test • Administered certification exams including: <ul style="list-style-type: none"> -45th Proficiency Test for Bank Internal Control and Audit -16th Certification Test for Financial Derivatives Sales Personnel -3rd Certification Test for Family Trust Planning Consultant -43rd Basic Proficiency Test for Bank Lending Personnel -16th Basic Proficiency Test for Financial Risk Management -44th Proficiency Test for Financial Planning Personnel -22nd Proficiency Test on Foreign Exchange Trading • -1682th–1684th sessions of the Basic Test on Financial Markets and Professional Ethics • Hosted a delegation from the Central Bank of Eswatini (CBE) • Hosted the Bankers Association seminar on the Responsible Banking Map System
APRIL	<ul style="list-style-type: none"> • Administered: <ul style="list-style-type: none"> -58th Proficiency Test for Trust Operations Personnel -40th Certificate Test for the Subject Test-Laws and Regulations on Trust Businesses -6th Certification Test for Eldercare Financial Planning Consultant -43rd Basic Proficiency Test for International Banking Personnel -17th Basic Test on the FinTech Knowledge • -1685th–1688th sessions of the Basic Test on Financial Markets and Professional Ethics • Signed an MoU with the Emirates Institute of Finance (EIF) • Co-hosted the CSR Financial Well-being Campaign Launch with Chang Hwa Bank
MAY	<ul style="list-style-type: none"> • Held the 13th Financial Industry Test and the 1689th–1694th sessions of the Basic Test on Financial Markets and Professional Ethics • Conducted the first 2024 practical test for the High Net-Worth Wealth Management Talent Development Program • Signed MoU with the Central Bank of Eswatini (CBE) • Hosted the Post-COP28 Green Investment Strategy Forum with the Bankers Association of the R.O.C. and the Bankers Association of Taipei • Held the Cybersecurity and Information Security Executive Program (CISE)
JUNE	<ul style="list-style-type: none"> • Held the 1695th–1700th sessions of the Basic Test on Financial Markets and Professional Ethics • Hosted a delegation from the Frankfurt am Main Chamber of Commerce and Industry / Frankfurt RheinMain • Hosted Taiwan Bank ESG Forum – Embracing the Carbon Pricing Era • Hosted Bankers Association's briefing session on trial calculations of the risk-based capital requirements for domestic bank securitization exposure, as well as two sessions on the implementation of capital requirements for market risk and credit valuation adjustment (CVA) risk under the finalized Basel III reform framework • Co-hosted the 2024 AML Financial Literacy Instructor Workshop with the Anti-Money Laundering Office, Executive Yuan • Hosted the 2025 ESG Finance Leaders' Roundtable Forum with the Bankers Association

JULY	<ul style="list-style-type: none"> • Held the 1702th–1707th sessions of the Basic Test on Financial Markets and Professional Ethics • Received a delegation from the Foundation for Defense of Democracies (FDD) • Hosted the Taiwan Real Estate and Economic Outlook Forum with Taiwan Bank
AUGUST	<ul style="list-style-type: none"> • Conducted a Crisis Simulation Exercise for Taiwan's Financial System • Held the 14th Financial Industry Test and the 1708th–1713th sessions of the Basic Test on Financial Markets and Professional Ethics • Organized the “Finance with Love: Ending Blood Shortages” joint blood donation campaign • Held the Fraud Prevention Youth Camp for instructor training • Launched the Advanced Sustainable Finance Certification Training • Hosted the Sanctions Compliance Best Practices Seminar for banks
SEPTEMBER	<ul style="list-style-type: none"> • Held the 1714th–1719th sessions of the Basic Test on Financial Markets and Professional Ethics • Awarded Grade A in the Taipei City Government's evaluation of private employment service agencies • Co-hosted the CSR Campaign Kickoff with Mega Bank – Kaohsiung Youth Empowerment • Held the 2024 Compliance Officers Exchange Forum • Hosted the 2024 Consumer Protection Briefing for banks on behalf of the FSC Banking Bureau
OCTOBER	<ul style="list-style-type: none"> • Held the Basic Test on Sustainable Development (new certification) • Held the 15th Financial Industry Test • Administered: <ul style="list-style-type: none"> -59th Proficiency Test for Trust Operations Personnel -41st Certificate Test for the Subject Test-Laws and Regulations on Trust Businesses -4th Certification Test for Family Trust Planning Consultant -18th Basic Test on the FinTech Knowledge -44th Basic Proficiency Test for International Banking Personnel -3rd Professional Exam for Anti-Money Laundering and Countering Terrorism Financing Specialists of 2024 -2nd 2024 HNWI Talent Development practical test -1720th–1725th sessions of the Basic Test on Financial Markets and Professional Ethics • Former Chairman of the Bankers Association, Dr. Paul C. D. Lei, appointed Chairman of TABF • Held the Financial Literacy for Social Benefit Employees Campaign Launch • Hosted the 2025 Taiwan Real Estate Outlook Forum with the Bankers Association of Taipei
NOVEMBER	<ul style="list-style-type: none"> • Held FinTech Taipei 2024 • Administered: <ul style="list-style-type: none"> -46th Proficiency Test for Bank Internal Control and Audit -17th Certification Test for Financial Derivatives Sales Personnel -7th Certification Test for Eldercare Financial Planning Consultant -44th Basic Proficiency Test for Bank Lending Personnel -19th Basic Proficiency Test for Financial Risk Management -45th Proficiency Test for Financial Planning Personnel -24th Advanced Proficiency Test for Bank Lending Personnel -1726th–1730th sessions of the Basic Test on Financial Markets and Professional Ethics • Dr. Kao Yi-Cheng, Associate Professor at Fu Jen Catholic University and advisor to the Executive Yuan, appointed President of TABF • Participated in 2024 IT Month & EdTech Taiwan • Co-organized and attended the 21st APABI Biennial Conference • Hosted the 2024 Financial Knowledge Olympiad – Final Round & Awards Ceremony • Co-hosted the CSR Campaign Results Presentation with Hua Nan Bank • Hosted the Green Industry Investment Forum with the FSC Comprehensive Planning Division • Co-hosted the Financial Education Instructor Workshop with the Bankers Association and Credit Cooperative Association
DECEMBER	<ul style="list-style-type: none"> • Held the 1731th–1736th sessions of the Basic Test on Financial Markets and Professional Ethics • Hosted the 12th Elite Awards for Taiwan Banking Excellence • Opened the 12th Elite Awards Special Exhibition • Released the 2024 Taiwan Financial Lives Survey • Hosted the Financial Product and Service Forum for High-Net-Worth Clients with the Bankers Association



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