**上海交通大学**

**Shanghai Jiao Tong University**

**《中国CEO国际财富管理高级研修班》**

**China CEO International Wealth Management**

**（立项编号：22100016）**

**(Project number: 22100016)**

**【院校介绍】**college introduction

**上海交通大学是我国历史最悠久、享誉海内外的高等学府之一，是教育部直属并与上海市共建的全国重点大学。十九世纪末，甲午战败，民族危难。中国近代著名实业家、教育家盛宣怀和一批有识之士秉持“自强首在储才，储才必先兴学”的信念，于1896年在上海创办了交通大学的前身——南洋公学。建校伊始，学校即坚持“求实学，务实业”的宗旨，以培养“第一等人才”为教育目标，精勤进取，笃行不倦，在二十世纪二三十年代已成为国内著名的高等学府，被誉为“东方MIT”。 经过121年的不懈努力，上海交通大学已经成为一所“综合性、研究型、国际化”的国内一流、国际知名大学。**

**Shanghai Jiao Tong University is one of the** **institutions of higher education with the longest history and high reputation all over the world and it is a national key university under the Ministry of Education and co-developed by Shanghai directly. At the end of the 19th century, China was defeated in the Sino-Japanese War of 1894-1895 and the National is facing a crisis. Sheng Xuanhuai, a well-known modern Chinese businessman and educator, adhered to the idea of “The priority of self-improvement is talent-storage, while the priority of talent-storage is education” with a batch of far-sighted men. They established the predecessor of Shanghai Jiao Tong University in Shanghai in 1896——Nanyang College. At the beginning of its establishment, the university adhered to the aim of “seeking real learning and pursuing industry” and it treated the cultivation of “first-class talents” as educational objective. It kept forging ahead and worked persistently without weariness. In the 1920s and the 1930s, it became a well-known institution of higher education in China and was known as “Eastern MIT”. After 121 years of unremitting efforts, Shanghai Jiao Tong University has become a “comprehensive, research-oriented and international” domestically first-class and internationally-famous university.**

**【课程背景】Curriculum Background**

**中国经济改革开放近40年来，富有进取创业精神的一代，财富得到了迅速积累和增长。而伴随着深化改革、国家产业转型以及市场化经济体制的建立完善，创造了大量财富的人们面临着更重要的问题：任何行业都有兴衰的周期，如何让财富持续保值增值？如何规划一段更加幸福的财富人生？家族代继更迭，如何让财富百年传承？**

**In the past 40 years of Chinese economic reform and opening up, the generation with progressive enterprising spirit has accumulated a large amount of wealth rapidly. However, with the deepening reform, national industrial transformation and the establishment and completion of marketization economic structure, people who have created the large amount of wealth are faced with a more important question: any industry has periods of rise and decline, how to keep increasing the value of wealth? How to plan a happier wealthy life? When family succession change, how to make a hundred years of wealth inheritance?**

**中国富裕阶层已完全进入全球资产配置时代。随着财富国际化的发展趋势，2017年1月1日中国正式启动CRS（common reporting System）****共同税务汇报系统，2018年9月将与CRS其它成员国进行第一次金融账户涉税信息交换。届时，很多中国人的海内外资产将无处遁形，如何适应CRS政策，已成为中国富人关心的热点话题。**

**The affluent class in China has entered the age of global asset allocation. With the development trend of wealth internationalization, China officially launched CRS (common reporting System) on January 1st, 2017, and it will be the first financial account tax-related information exchange with other CRS member countries in September 2018. At that time, a lot of Chinese overseas assets will be nowhere to hide. Then, how to adapt to CRS policies has become a hot topic for concern Chinese rich.**

**上海交通大学组织国内外顶级师资和投资界资源，借鉴欧美百年家族的财富管理经验，结合中国财富人群特点，推出“国际财富管理”专题课程，旨让学员多维度地了解世界前沿的投资与管理理念、掌握财富管理最务实、最有效的方法，懂得辨别纷繁的投资选择，进行科学的财富管理，让企业资产与个人财富得以有效增值，实现美好的财富人生！**

**Shanghai Jiao Tong University has organized domestic and foreign top-grade teachers and resources of investment field, imitated wealth management experiences of centennial families in Europe and the USA, combined characteristics of Chinese wealth crowd,launched the special course of “International Wealth Management”, which aims to have students understand world-leading investment and management philosophies multi-dimensionally, grasp the most practical and most effective methods of wealth management, understand how to distinguish the complicated investment choices, conduct scientific wealth management, have enterprise assets and individual wealth appreciate effectively and realize beautiful wealthy life!**

**【课程收获】 Curriculum Achievements**

* **洞悉全球财富管理行业的前世今生，把握未来发展趋势**
* **Understanding the history of global wealth management industry, grasping future development trend**
* **熟悉国外金融市场的环境和规则，了解在海外资产配置过程中可能遇到的“陷阱”及避险方法**
* **Being familiar with the environment and rules of foreign financial market, understanding possible “traps” in overseas asset allocation process and how to avoid risks**
* **学习海外家族企业财富管理与传承的经验**
* **Learning experiences of wealth management and succession from overseas family enterprises**
* **研讨瑞士私人银行在财富管理领域的前沿理论和成功案例**
* **Discussing cutting-edge theories of wealth management field from Swiss private banks and successful cases**
* **深度剖析国内各类市场上的产品，学习如何选择最适合的产品组合，全面提升投资能力**
* **Analyzing various products in domestic market, learning how to choose the most suitable portfolio and improving investment ability comprehensively**
* **面对面与海内外财富管理大师交流心得**
* **Communicating with Chinese and foreign masters at wealth management face to face**
* **实操财税管理及海外资产配置**
* **Real operation of taxation management and overseas asset allocation**

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| **【课程设置】 Curriculum Provision**

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| 模块一、入学模块 Module One Admission Module  |
| 开学典礼 Opening ceremony百年交大校园Shanghai Jiao Tong University campus with hundreds of years of history钱学森图书馆等参观Visiting Qian Xuesen Library |
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| 模块二、财富增值模块Module Two Wealth Appreciation Module |  |  |  |
| **(一)世界经济形势分析与中国宏观政策Analysis of global economic situation and Chinese macroscopic policies** |  |  |
| **1.全球投资****Global investment** |  |  | **2.中国宏观经济分析****Analysis of Chinese macroscopic economy** |
| 全球投资趋势Global investment trend |  |  | 消费和投资对国民经济均衡的影响Influences of consumption and investment on the equilibrium of national economy |
| 全球投资动态Global investment dynamic condition |  |  | 新常态下的金融形势与热点Financial situation and hotspot under new normal state |
| 全球投资项目纵览Overview of global investment project  |  |  | 中国经济新周期“机遇与挑战” “Opportunities and challenges” in Chinese economic new period |
| 海外资产投资与配置Overseas asset investment and allocation |  |  | 十三五规划：战略新兴产业、人民币国际化 The 13th Five-year Plan: strategic emerging industry, RMB internationalization |
|  |  |  | 十八大后的中国经济Chinese economy after the 18th National Congress of the Communist Party of China |
|  |  |  | 中国资本市场的历史演变及多层次资本市场分析Historical evolution of Chinese capital market and analysis of multi-level capital market |
|  |  |  | 中国经济大趋势“世界视角” “World perspective” of the general trend of Chinese economy |
| **(二)金融投资市场****Financial investment market** |  |  |  |
| **3.私募股权投资****Private equity investment**  |  |  | **4.股票投资策略****Stock investment strategies**  |
| 私募股权概述Overview of private equity |  |  | 价值投资理念和策略Value investment ideals and strategies |
| 私募基金的政策法规与操作方略Policies, regulations and operational strategies of private equity |  |  | 市场分析与行业分析Market analysis and industrial analysis |
| 私募股权投资的三大核心能力Three core abilities of private equity investment |  |  | 公司分析与股票选择Company analysis and stock choices |
| 私募股权基金的运作流程Operational procedure of private equity fund  |  |  | 股票市场投资决策Stock market investment decisions |
| 私募股权基金投资原则Investment principles of private equity fund |  |  |  |
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| **5.固定收益与债券****Constant return and bonds** |  |  | **6.对冲基金****Hedge fund** |
| 国际债券市场International bond market |  |  | 对冲基金概述Introduction to hedge fund |
| 固定收益分析Analysis on constant return |  |  | 分析对冲基金的投资策略Investment strategies of hedge fund |
| 债券衍生产品投资Investment on bond derivatives |  |  | 对冲基金的风险Risks of hedge fund |
| 次级债问题Subordinated debt problems |  |  |  |
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| **7.金融衍生产品****Financial derivatives** |  |  | **8.外汇投资Foreign exchange** |
| 融资融券Securities margin trading |  |  | 全球外汇市场运行Operation of global foreign exchange market |
| 股指期货Stock index futures |  |  | 主要货币基本面分析Major currency fundamental analysis  |
| 金融衍生产品投资Investment on financial derivatives |  |  | 经济数据解读及央行货币政策Explanation of economic data and Central Bank’s monetary policy |
| 黄金与期货投资Gold and futures investment |  |  | 外汇投资的完善心智培养。Complete mental cultivation of foreign exchange |
| 黄金实物投资Gold real investment  |  |  |  |
| 黄金投资的战略和战术Strategies and tactics of gold investment |  |  |  |
| 商品期货投资Commodity futures investment |  |  |  |
| 商品期货市场分析Analysis of commodity futures market |  |  |  |
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| **9.信托管理****Trust management** |  |  |  |
| 信托起源和在世界应用现状Origin of trust management and application in the world |  |  |  |
| 信托引入我国以来的发展，法律法规等背景介绍Development of trust since its introduction into China and background introduction of laws and regulations |  |  |
| 信托的种类、功能及在财富创造、管理和传承中的独特作用Types and functions of trust and its unique rule in wealth creation, management and succession |
| 海外家族信托案例 Case of overseas family trust |  |  |  |
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| **(二)非金融投资市场Non-financial investment market** |  |  |  |
| **10.不动产投资** **Real estate investment** |  |  | **11.艺术品投资****Art investment** |
| 中国创富之路Wealth creation road in China |  |  | 艺术品鉴赏与投资Art appreciation and investment |
| 中国宏观经济及四大城市房地产发展趋势Chinese macro economy and development trend of real estate in four major cities |  | 艺术品投资与拍卖Art investment and auction |
| 上海经济与房地产宏观走势分析Shanghai economy and macro trend analysis of real estate |  |  | 古玩、书画收藏与投资Antique and painting and calligraphy collection and investment |
| 海外不动产投资策略Investment strategies of overseas real estate |  |  | 当代艺术鉴赏与收藏Contemporary art appreciation and collection  |
| 私人投资家如何投资房地产How private investors invest real estate |  |  | 珠宝、玉石收藏与投资Jewelry and jade collection and investment |
|  |  |  | 艺术、人脑与心智投资Art, human brain and mental investment |
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| 模块三、财富传承模块Module Three Wealth Succession Module |  |  |  |
| **12.婚姻经济与家庭财产管理****Marriage economy and family wealth management** |  | **13.资产配置和投资组合论坛** **Asset allocation and portfolio forum**  |
| 中国当前婚姻家庭纠纷新的特点Characteristics of contemporary marriage and family disputes in China |  |  | 投资大师面对面Face to face with investment masters |
| 家庭财富的转移、规划和财产传承Transference, planning of family wealth and property succession |  |  | 家庭资产配置实操演练Maneuvers of family asset allocation |
| 再婚富豪的配偶及子女间的财产平衡术Property balance between spouses and children of remarried wealthy people |  | 股票投资实战操盘Actual practice and stock operation of stock investment |
| 家庭不动产投资的权属设置技巧Ownership setting skills of investment in family real estate |  |  |  |
| 家族治理与文化传承Family governance and cultural succession |  |  |  |
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| **14.创新型家族企业****Innovative family business**  |  |  | **15.富裕家庭的税收筹划****Tax planning of wealthy families** |
| 家族企业的特殊性Particularity of family business |  |  | 财税风险Finance and tax risks |
| 巡航型与创新型家族企业Cruise and innovative family business |  |  | 税务筹划原理Tax planning principles |
| 家族性 + 创造性 = 竞争优势Family + innovative= competitive advantages |  |  | 个人理财Personal finance |
| 创新型家族企业家Innovative family entrepreneurs |  |  | 与专家面对面个性化交流Individual face-to-face communication with experts |
| 家族企业百年计划Hundred years of plan for family business |  |  |  |
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| 模块四、财富智慧模块Module Four Wealth Wisdom Module |  |  |  |
| 16.易经与财富Book of Changes and wealth  |  |  | **17.财富解读杂家精要****Explanation of wealth and essentials of the eclectics** |
| 解密《周易》Decoding *Book of Changes* |  |  | 孙子兵法与商道Sun Tzu’s the Art of War and the Art of Business |
| --独特的观点解密易经的起源、功能、内涵以及作用 | 鬼谷子与合众连横Guiguzi and combining vertically and uniting transversely  |
| 探索人生规律 打造财富人生Decoding the origin, function, intention and rules in *Book of Changes* with unique viewpoints. Exploring life rules and creating wealthy life |  |  | 皇帝内经与养生 The Emperor’s Internal Canon of Medicine and health maintenance |
| --认识人生运行规律，成就幸福完美人生 |  | 法家与控制力Legalists and control force |
| Understanding the operational rules of life and creating a happy and perfect life |  |  |  |
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| 模块五、财富体验模块Module Five Wealth Experience Module |  |  |  |
| **18.财富游戏****Wealth game**  |  |  |  |
| 风险偏好和管理Risk preference and management |  |  |  |
| 模拟投资实战练习Simulated investment practice |  |  |  |
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| **19.财富生活**财富私董会 Private Wealth Club家庭亲密日 Family Day品质生活汇（高尔夫、红酒、珠宝、马术、游艇会、奢侈品、旗袍） Quality life club (Golf, wine, Golf, wine, jewelry, equestrian, yacht club, luxury, cheongsam善富会（天使妈妈） Charity society(Angel mother)**模块六、财富之旅模块（选修）**Module Six Journey of Wealth Module (elective) |  |  |  |
| **20.财富之旅****Journey of wealth** |  |  |  |
| 瑞士私人银行探秘之旅Journey of exploration of Swiss private banks |  |  |  |
| 美国富豪财富文化归宿之旅Journey of wealthy culture home of American wealthy people |  |  |  |
| 日本百年家族企业传承参访之旅Journey of hundreds of years of family business succession n Japan |  |  |  |
| 新加坡/香港金融投资考察之旅Journey of financial investment exploration in Singapore/ Hong Kong |  |  |  |
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| **模块七、毕业模块**Module Seven Graduation Module |  |  |  |
| **毕业典礼****Graduation ceremony****颁奖仪式****Prize-awarding ceremony** |  |  |  |

**【拟邀师资】Tentative Invested Teachers** **Urs buchmann伍兹•布克曼****瑞士信贷集团香港分部大中华区副总裁，博士，buchmann于1985加入瑞士信贷银行，1987成为银行的首席代表，之后出任瑞士第一波士顿信袋银行中国区域总裁。自1997以来，他担任瑞士信贷中国金融服务总裁，2007年任中国企业银行业务总裁。2009年9月，buchmann博士被任命为瑞士信贷企业与机构客户管理委员成员，并于2015年8月成为亚太地区企业和机构客户副总裁。他擅长协调各种信贷业务单位，为中国及亚洲企业与机构深入挖掘投资收益。****Vice President of Greater China of Credit Suisse Group in Hong Kong. Dr. Buchmann joined Credit Suisse in 1985 and became the bank's chief representative in 1987. Later, he held the post of President of China Area of Credit Suisse First Boston. Since 1997, he served as President of Chinese financial services in Credit Suisse. In 2007, he became the President of Chinese corporate banking business. In September 2009, Dr. Buchmann was appointed as the member of Credit Suisse Enterprises and Institutional Client Management Committee and became the Vice President of corporate and institutional clients in Asia-Pacific Region in August 2015. He is good at coordinating various credit business units and developing investment returns for Chinese and Asian companies and institutions.****Pierre DuPont V.皮埃尔•杜邦****皮埃尔·杜邦家族是一家以科研为基础的全球性企业，在全球70个国家经营业务，共有员工79,000多人。有135个生产和加工设施。在美国有40多个研发及客户服务实验室，**在11个国家有超过35个的实验室。**第五代皮埃尔·杜邦，为全球近400个家族办公室提供顾问服务，杜邦通过所服务的600多个家族与自己家族的实例讲解了家族财富管理中的问题与应对方式。参与课程的本土家族办公室也提出了自身所遇到的问题，并由杜邦先生进行解答。各方机构均对杜邦先生的专业性给予了高度评价。****Pierre dupont family is a global enterprise based on scientific research, business in 70 countries worldwide, a total of more than 79000 employees.There are 135 production and processing facilities.In the United States has more than 40 r&d and customer service laboratories, in 11 countries more than 35 laboratories。The fifth generation Pierre DuPont, providing advisory services for nearly 400 family offices in global, DuPont explained the problems and coping styles on family wealth management by the instances of more than 600 families he served and his family. Local family offices which participating in the course also put forward the problem and answer by DuPont. All institutions gave high evaluation on his professional. c American education.****潘英丽** **上海交通大学安泰经济与管理学院金融系主任，教授;现代金融研究中心主任。上海市政府发展研究中心发展战略研究所潘英丽（国际金融中心建设）工作室首席专家。研究方向：国际金融;货币与银行研究。 研究领域：开放条件下的宏观经济理论和政策；国际金融与国际金融中心；经济发展中的币与银行研究。****Pan Yingli** **Chairman of Financial Department and professor of Antai College of Economics and Management of Shanghai Jiao Tong University，Director of Modern Financial Research Center，Chief expert of Pan Yingli (International financial center construction) Studio of Development Strategy Research Institute of Development Research Center of Shanghai Government， Research interests:  International Finance, currency and bankingResearch areas: macroeconomic theory and policy under open condition; International finance and international financial center， The currency and banking research in economic development.****费一文****上海交通大学安泰经济与管理学院金融系副教授，2006-2009年任上海交通大学安泰经济与管理学院金融系执行系主任， EMBA和高级管理人员《公司金融》课程教学，主要研究方向：中国企业的公司金融战略;担任多家企业咨询顾问，承担了政府和公司的决策咨询项目；家族企业控制与传承**。**是上海电视台第一财经《解码财商》主讲嘉宾，近年专注互联网金融课题研究。****Fei Yiwen****Associate professor of Financial Department of Antai College of Economics and Management of Shanghai Jiao Tong University， Executive chairman of Financial Department of Antai College of Economics and Management of Shanghai Jiao Tong University in 2006-2009，Teaching "Corporate Finance" for EMBA and senior management personnel， Consultant for many companies， Responsible for decision-making consultation project of government and corporate，Main research interests: corporate financial strategy of Chinese enterprises， family business control and inheritance. Guest speaker of "Decoding Financial Quotient", CBN, Shanghai Television Station; Focus on Internet financial research in recent years.****孔爱国****复旦大学管理学院财务金融系教授、博士生导师，复旦大学EMBA授课教授，06年华盛顿大学访问学者，上海市曙光学者；主要研究方向： 致力于财务管理、资本市场、宏观经济领域的学术研究；孔教授理论基础扎实，视野开阔，语言幽默，深入浅出，是复旦大学最受EMBA学生欢迎的授课教授之一。****Kong Aiguo** **Professor and doctoral supervisor of Division of Accounting & Finance of the School of Management, Fudan University， Teacher of EMBA of Fudan University，Visiting scholar at the University of Washington in 2006， Shanghai Dawn scholars， Main research interests :Mainly engaged in academic research in financial management, capital markets and macroeconomic field，Professor Kong has solid theory foundation, wide vision and humorous language, and explains the profound in simple terms. He is one of the most popular teaching professors among EMBA students.****吴 飞** **上海高级金融学院副教授，主要研究领域包括行为金融、市场微观结构和国际金融市场。实践研究是私人财富管理领域，他是《财富管理 》杂志编委，《福布斯中文网》、《财富中文网》、《新浪财经》，《华夏理财》、《财富管理》等媒体的财富管理专栏撰稿人及《家族办公室全书》和《家族办公室指南》书籍中文译者。****Wu Fei** **Associate professor of Shanghai Advanced Institute of Finance，Main research includes behavioral finance, market microstructure and the international financial market，Practice research is in the field of private wealth management，He is an editorial board member of “Wealth”， Columnist of wealth management of "Forbes China", "Fortune China", "Sina Finance", "HuaXia Wealth" and "Wealth", and Chinese translator of “Family Office "and “Family Office Guide".****李秀娟** **中欧国际工商学院管理学教授、中欧领导行为实验室研究主任。曾任**[**长江商学院**](http://baike.baidu.com/view/244930.htm)**管理学教授和副院长、**[**新加坡国立大学商学院**](http://baike.baidu.com/view/1288399.htm)**副院长、美国麻省大学博士，《亚太管理学杂志》副主编。是新加坡国立大学商学院EMBA课程、国际MBA的创办主任和高层经理教育联执主任。主要研究领域为华人企业管理及领导，跨文化管理，**[**人力资源管理**](http://baike.baidu.com/view/4692.htm)**以及女性领导与企业家等。在，Human Relations、Family Business Review Journal of Management Development Journal of Entrepreneurl Behavior Research和《管理世界》等国内外期刊上发表著述多篇。****Li Xiujuan****Professor of managment，CEIBS Research director of Leadership Behavioral Laboratory. Management professor and deputy director of Cheung Kong Graduate School of Business， Vice President of Commercial College of National University of Singapore， Ph.D. of the University of Massachusetts; Associate editor of the “Journal of Asia Pacific Management”，Founding director of EMBA and International MBA of Commercial College of National University of Singapore and co-executive director of high-level manager education;Main research field is Chinese business management and leadership, cross-cultural management, human resource management as well as female leadership and entrepreneurship;Published many essays on journals at home and abroad such as “Human Relations”, “Family Business Review”, “Journal of Management Development”, “Journal of Entrepreneurl Behavior Research”and “Management World”.****陆蓉****上海财经大学金融学院，博士后,教授,博士生导师。教授课程： 投资学、行为金融学、证券投资基金学、金融工程学 研究领域： 研究方向为资本市场投资与管理。目前的研究包括基金治理、金融投资工具运用、投资者行为、行为金融学等。****Lu Rong****Postdoctor, professor and doctoral supervisor of School of Economics and Finance of Shanghai University of Finance and Economics，Teaching courses: Investment Principles, Behavioral Finance, Securities Investment Funds and Financial Engineering;Research area， The research direction is the capital market investment and management，The present study includes fund management, application of financial investment tools, investor behavior and behavioral finance and etc.****华伟** **华东师范大学东方房地产学院常务副院长；建设部市场决策咨询专家；央行上海总部征信专家；上海市土地学会副会长；多个地方政府与企业集团顾问。****Hua Wei** **The executive vice president of East Real Estate Institute of East China Normal University，Consultant expert of marketing decision of Construction Ministry，Credit investigation expert of Shanghai headquarters of Central Bank，Vice President of Shanghai Land Society，Consultant for many local government and enterprise group.****傅连康 上海对外经贸大学金融学系主任；清华大学、北京大学、复旦大学、上海交通大学EMBA课程特聘教授。主要研究领域：投资分析、公司财务管理、国际金融、货币理论与政策等。复旦大学经济学系本科毕业，经济学学士；上海财经大学国际金融专业研究生毕业，经济学硕士；在上海对外经贸大学（原上海外贸学院）任教，先后讲授《投资分析与组合管理》、《国际金融》、《公司理财》、《会计学》等几十门课程，兼任公司投资顾问、财务顾问，中国国际经济合作学会、上海国际贸易学会会员。****Fu Liankang** **Department head of Finance Department of Shanghai University of International Business and Economics，****Specially-appointed professor for EMBA course of Tsinghua University, Peking University, Fudan University and Shanghai Jiao Tong University，The main research areas: Investment analysis, company financial management, international finance, monetary theory and policy and etc.Achieved bachelor of economics from the department of economics of Fudan University， Achieved master of economics from international finance department of Shanghai University of Finance and Economics， eacher from Shanghai University of International Business and Economics (Formerly Shanghai Institute of Foreign Trade) for Investment Analysis and Portfolio Management, International Finance, Corporate Finance, Accounting and other dozens of courses，Company investment adviser and financial consultant; member of China Association for International Economic Cooperation and Shanghai International Trade Association.****王德培** **中国经济体制改革研究会副会长，首席研究员著名经济学家，享受国务院特殊津贴专家、教授；领衔编创了《高层内参》、《福卡分析》、《经济预测》等内部报告，深受国家各级机关、企事业单位领导的关注；主笔出版的书籍有二十余册，包括《第四次金融大爆炸》、《再平衡—中国的优势与美国的强势》等深受广泛关注的预测专著。****Wang Depei** **Vice president and chief researcher of China Society of Economic Reform，famous economist，enjoy the special allowance from the State Council，professor，Compiled and created "High-level Internal Reference", "Analysis of Forecast", “Economic Forecast” and other internal reports, which paid much attention by the leaders of the state organs and enterprises and public institutions at all levels，Published more than twenty volumes of books which including “The Fourth Financial Explosion”, "Rebalancing - Chinese Advantage and American Strength” and other popular predicted monographs.****郑森源** **台湾东吴大学财会系毕业，曾任台湾上市公司内部稽核（审计），曾任IARFC中国发展中心秘书长，2006年始，构建IARFC中国发展中心家庭财务规划专业认证培训体系，经历约1500场财富管理相关讲授课经验，2007、2008、2010、2012年世界华人保险大会及国际龙奖IDA年会特邀讲师。专项研究：保险在家庭财务规划中扮演的角色。****Zheng Senyuan** **Graduated from Finance and Accounting Department of Taiwan Soochow University， Internal audit of Taiwan listed company before， Secretary-general of Chinese Developing Center of IARFC before， Since 2006, he started to build professional certification training system of family financial planning of Chinese Developing Center of IARFC， 1500 lectures about wealth management; Specially invited lecturer of the Worldwide Chinese Insurance Congress in 2007, 2008, 2010 and 2012， Individualized studies， The role of insurance in family financial planning.****范惠众****2007年底加入常青藤资本，先后参北京中料金财、江西国鸿集团、上海新旭发、北京博洛尼、昆明苑花卉、浙江创联软件、海南呀诺达、上海天天加分、上海华燕发展、北京中成新星的投资或项目后续管理工作;2008年至今，先后担任中科金财监事、昆明锦苑花卉董事、天天加分监事、上海华燕置业发展副总裁、董事。**[**范惠众**](http://www.trjcn.com/investor/detail_836.html)**先生曾在上海WTO事务咨询中心、上海华宝兴业基金和****保银中国直接投资。****Fan Huizhong****Joined Ivy Capital at the end of 2007， Participated in the investment or project follow-up of Beijing SINO DATA, Jiangxi Guohong Group, Shanghai XuFa, Beijing Boloni, Kunming Yuanhuahui, Zhejiang Crea-Union, Hainan YANODA, Shanghai PLUS, Shanghai Huayan Development, Beijing New Star successively， He successively served as the supervisor of SINO DATA, director of Kunming Yuanhuahui, supervisor of Shanghai PLUS, vice president and manager of Shanghai Huayan Development， Worked in Shanghai WTO Affairs Consultation Center, Shanghai Fortune SG Fund Management Co., Ltd. and PINPOINT。****朱啸虎** **金沙江创业投资基金合伙人。10年投出5个独角兽，代表案例：兰亭集势、滴滴出行、饿了么、小红书、映客。拥有复旦大学的世界经济学硕士学位，上海交通大学通信工程学士学位。曾是麦肯锡咨询公司的资深咨询顾问。在企业战略、流程再造、成本管理、IT系统等方面有丰富的咨询及实施经验。****Zhu Xiaohu****Partner of GSR Ventures， Invested five unicorns for 10 years， Representative cases: Lightinthebox,** **Didi Taxi, ele.me, Xiaohongshu and Inke;Master of world economics of Fudan University， Bachelor of communication engineering of Shanghai Jiao Tong University; Senior consultant of McKinsey， Rich experience in consulting and implementation in enterprise strategy, process reengineering, cost management, IT system and etc.** **祝君波** **上海市新闻出版局局长，上海市政协委员兼政协文史委副主任，上海世界华人收藏家大会组委会执行副主任，中国最美的书评委会副主任及编审；华东师范大学艺术研究所、上海理工大学传媒专业、上海大学美术学院等高校的硕士生导师。从事艺术品投资交易和出版业四十年，1992年成立中国大陆第一家艺术品拍卖公司—上海朵云轩拍卖公司，自此改变大陆艺术品交易模式，被业界誉为“中国拍卖第一人”。****Zhu Junbo****Director of Shanghai Press and Publication， Shanghai CPPCC member and deputy director of the Literature and History Committee of CPPCC， Executive vice director of the World Chinese Collectors Convention in Shanghai， Deputy director and editor of judging panel of the Beauty of Books in China，Master supervisor of Art Institute of East China Normal University, Media and Communication Major of University of Shanghai for Science and Technology and College of Fine Arts of Shanghai University，Engaged in art investment transactions and publishing for forty years，Founded the first art auction company in Chinese Mainland—Shanghai DuoYunXuan Auction Company in 1992 and changed the artwork trading patterns in mainland and was praised as "The first person of Chinese auction".****章震宇** **华东师范大学应用心理学博士，心理学副教授，。上海市心理学会理事，上海卫生心理学会理事、心理健康专业委员会副主任，上海高校心理咨询委员会理事、专家委员会成员，上海市公安局特聘心理咨询专家，**[**上海中医药大学**](http://baike.so.com/doc/2887816-3047591.html)**心理教研室主任。曾经在多家媒体担任特约心理咨询专家，具有长达十余年的心理咨询、高校教学、人员培训和人事测评经验。擅长团体咨询、职业咨询、婚姻家庭咨询。****Zhang Zhenyu****Doctor of applied psychology in East China Normal University and associate professor of psychology，Director of Shanghai Psychological Society， Director of the Shanghai Society of Mental Hygiene， Deputy director of Shanghai Mental Health Professional Committee， Director of Shanghai College Counseling Committee， Member of Expert Committee， Specially invited psychological counseling experts of Shanghai Municipal Public Security Bureau， Director of Psychology Department of Shanghai University of Traditional Chinese Medicine，Psychological consultant in various media， Had the experience of psychological counseling, college teaching, personnel training and assessment for more than ten years， Good at group counseling, career counseling, marriage and family counseling.****郑锦桥** **北大清华澳洲麦格里大学客座教授，知名财富管理及股权投资专家、国际家族基金协会高级顾问，中房协金融委副主任，现任嘉富诚股权投资基金管理有限公司董事长，毕业于英国Leeds 商学院MBA，天津商学院研究生院，中国注册会计师、高级会计师、注册税务师，1996年创办金桥联合会计师事务所，1999年任岳华集团会计师事务所高级合伙人，之前工作于政府财政部门。****Zheng Jinqiao****Visiting professor of Peking University, Tsinghai University and Australian Macquarie University，Well-known expert on wealth management and equity investment， Senior consultant of IFOA， Deputy director of Finance Committee of China Real Estate Association， Chairman of Richlink Capital Private Equity Management Co., Ltd.; Graduated from Commercial College of Leeds MBA， Achieved master degree of Tianjin University of Commerce， Chinese Certified Public Accountant， Senior Accountant; Certified Tax Agent; Founded Jinqiao C. P. A. Partnershi in 1996， Senior partner of Yuehua Certified Public Accountants in 1999， Used to work in finance department of government.****荀玉根** **海通证券首席策略分析师，注册国际投资分析师（CIIA），《新财富》最佳分析师2014年第三名、2013年第三名，《证券市场周刊水晶球奖》最佳分析师2014年第四名、2013年第五名，《****中国证券报金牛奖》最佳分析师2014年第五名、2013年第三名，《第一财经》最佳分析师2014年第三名，微信公众号“荀玉根-策略研究”。****Xun Yugen****Chief strategist of Haitong Securities， Certified International Investment Analysts (CIIA)， The third best analyst in 2014 and 2013 of "New Fortune"， The fourth best analyst in 2014 and fifth in 2013 of "Crystal Ball Award of Securities Market Weekly"， The fifth best analyst in 2014 and the third in 2013 of "Golden Bull Award of China Securities Journal"， The third best analyst in 2014 of "CBN Weekly "， WeChat Official Accounts "XunYugen—Strategy research".****郑 旻** **复旦大学世界经济研究所金融学硕士，中国证监会首批注册分析师，从业经历23年，现任国元证券研究中心宏观策略研究员。对国际国内金融市场变化有较高敏感度，从事过A股、B股、国债现券、回购、期货、杠杆基金等所有交易所挂牌品种的操作，擅长从宏观基本面出发剖析股市前景，对数据和政策的把握有独到见解，善于挖掘不为人注意的市场套利机会。****Zheng Min** **Master of Finance of World Economy Research Institute of Fudan University， First registered analyst of China Securities Regulatory Commission， 23 years of experience; Macro strategy researcher of Guoyuan Securities Research Center at present， Higher sensitivity on financial market changes in international and domestic， Engaged in the operation of A shares, B shares, national debt, the buy-back, futures, leveraged funds and all listed varieties of Exchange. Good at starting from the macro fundamentals analysis stock market prospects, the assurance of pair of data and policy have unique insights, good at digging not noticed market arbitrage opportunities.****【招生对象】Enrollment Target*** **企业董事长、总经理等高层管理人员**
* **Enterprise chairman, general manager and other senior management**
* **金融可投资资产达到1000万人民币以上高净值人士**
* **High net value personage who can invest higher than 10 million RMB of investment assets**
* **从事财富管理行业的中高层管理人员**
* **Middle and senior manager engaged in wealth management**

**（需申请审核通过方能参加）****(Need to pass the application and audit)****【学习形式】Studying Form** * **教学方式：课堂面授+案例研判+实盘演练+移动游学+workshop;**
* **Teaching methods: face to face teaching in classroom + case study +actual quotation practice + moving studying tour + workshop**
* **学习时间：学制一年，双休日集中上课;**
* **Teaching time: one year of educational system， having classes at two-day day offs**

**【学员待遇】Student Treatment*** **您将有资格申请加入上海交通大学校友会组织，校友俱乐部活动也将为您提供体育休闲、精英沙龙、管理研讨等系列活动，创建一个高品质信息传播和交流的平台，共享管理智慧，共创多赢局面。庞大的学员资源网络平台将使您能聆听业界强者的声音，寻找到理想的合作伙伴。**
* **You will be eligible to join alumni association of Shanghai Jiao Tong University. Alumni club activities will also provide you with sports leisure, elite salons, management discussion and other series of activities to create a high quality of information dissemination and communication platform to share management wisdom and create a win-win situation. Huge network platform of student resources will enable you to listen to the voice of power in industry to find ideal partner.**
* **学习期满考核合格颁发《上海交通大学中国CEO国际财富管理高级研修班》结业证书(盖上海交通大学教育培训专用章钢印)，学籍统一存档 管理。**
* **The qualified students will have course-completion certificate of Senior Training Class of China CEO International Wealth Management of Shanghai Jiao Tong University (Seal the special stamp of educational training of Shanghai Jiao Tong University). The school roll will keep in the archives uniformly.**

**【入学流程】Enrolling Process*** **提交入学资料：报名表1份 ; 个人简历、企业简介； 学历证书、身份证复印件各1张 ; 个人名片1张 ; 小两寸蓝底彩照2张**
* **Submit enrolling information: 1 application form; resume, enterprise profile; 1 academic certificate and 1 copy of ID card; 1 business card; 2 color pictures of 3.5×4.5(cm) blue background**
* **缴纳学费：学员接到录取通知书后，请将学费汇入以下账户(请在“汇款用途”栏注明“财富管理”和学员姓名)，并将汇款凭证复印件传真到上海交通大学继续教育学院EDP中心。缴费后由培训中心统一开具发票。**
* **Tuition payment: After receiving the admission notice, please remit the tuition to the following account (Please indicate "wealth management" and student's name in "purpose of remittance"), and fax the copy of the remittance to EDP Center of School of Continuing Education of Shanghai Jiao Tong University. After the payment, training center will issue the invoice uniformly.**

**户　名：上海交通大学****Account Name: Shanghai Jiao Tong University****账号：454659250319** **Account Number: 454659250319****开户行：中国银行上海市上海交通大学徐汇校区支行****Opening Bank: Xuhui Campus Sub-branch of Shanghai Jiao Tong University, Bank of China** **【研习费用】 Tuition Fee** * + **报名费：RMB 800元/人**
	+ **Application Fee: RMB 800yuan/person**
	+ **注：报名后，除校方原因无法提供教学的，报名费恕不退还。**
	+ **Remark: After the application, the application fees will not be returned except that the school cannot provide the studying.**
	+ **学费：RMB 68800元 /人**
	+ **Tuition: RMB 68800yuan/person**
	+ **注：学费含授课费、教材费、讲义费、茶点费、教学管理费；不包含国内外游学的课程、食宿、交通、签证费等其它费用。**
	+ **Remark: Tuition is including the cost on teaching, learning materials, lecture notes, tea, teaching management; Not include the course, accommodation, transportation, visa fee and other expenses on studying tour at home and abroad.**

**联系地址上海市法华镇路535号（长宁校区）交通大学主楼****Contact Address: Room 213, 2 floor of Main building, Shanghai Jiao Tong University (Changning Campus), No. 535 of Fahuazhen Road, Shanghai** **【上课时间/地点】Class Hour and Address**  **开学时间：每月集中2-3天上课（周六、周日或周五、周六、周日），全部课程在一年左右完成，（学期期间穿插精品高端讲座）；学制一年。****上课地点：上海交通大学****Class location: Shanghai Jiao Tong University** |  |  |  |

* **联系方式： 400-061-6586 杜老师**

校方通用报名表

|  |  |
| --- | --- |
| 课程全名 |  |
| 姓 名 |  | 性 别 |  | 出生日期 |  |
| 民 族 |  | 籍 贯 |  | 职务/职称 |  |
| 身份证号 |  | 工作年限 |  |
| 教育程度 | 学 历 |  | 毕业院校 |  |
| 学 位 |  | 专 业 |  |
| 毕业时间 |  | 付款方式 | 银行汇款 现今付款 电子转账 |
| 公司名称 |  |
| 电 话 |  | 传 真 |  |
| 手 机 |  | 邮 编 |  |
| 电子邮箱 |  | 单位性质 |  |
| 通信地址 |  |
| 工作简历 |
|  |
| 学习建议 |
|  |