

2024 Chronology

Date	Event
01.01~03.31	Signed a memorandum for licensing examination and promotional collaboration with National Taichung University of Science and Technology, Southern Taiwan University of Science and Technology, Shih Hsin University, and Chung Yuan Christian University, respectively
01.01~08.31	In 2024, produced and broadcasted 39 episodes of the 2023 Futures Knowledge Online Program (the production period was extended to 2024)
01.03~12.31	Organized the Preparation and Promotion of Teaching Plans for Investment and Financial Management by Age, under the commission of TWSE. The initiative included the development of a senior high and vocational school-level teaching plan, an online training camp for junior high school seed teachers, and 3 training sessions for senior high and vocational school seed teachers. In July, the plans were made available for teachers to apply for and use, along with the promotion of their classroom implementation
02.01	Added a verification mechanism for file uploads in the Power of Attorney Inquiry and Reporting System to prevent the upload of illegal files
02.06~12.27	Organized 80 sessions of the 2024 Bringing Financial Literacy to Your Home Seminar - VAC Project, under the commission of the Taiwan Financial Services Roundtable
02.22~04.18	Arranged the Workshop for New Disclosure Requirements on Shareholders of TWSE- and TPEX-Listed Companies with 5% Shareholding or More, under the commission of TWSE
02.23	Held the 1st Sustainable Finance Evaluation Awards Ceremony
02.29~06.05	Organized the International Finance Seminars Courses for the 2023 academic year
03.01	Partnered with the Taiwan Blood Services Foundation to organize a charitable blood donation event at the Nanhai Blood Donation Center
03.01~10.22	Organized the Training Program on Enhanced English Communication of Securities and Futures Merchants, covering four sessions on the following topics: English for Social Situations, Meetings, Proposals & Reports, and Presentations
03.01~12.07	Organized 16 sessions of the 2024 In-Depth Financial Knowledge Seminar, under the commission of the Taiwan Financial Services Roundtable
03.01~12.31	Continued to arrange 5 sessions of the University Capital Market Specialized Practical Courses
03.06~06.26	The 2023 Financial Innovation and Transaction Credit Courses were held in Tainan, under the sponsorship of TWSE, TAIFEX, and TDCC
03.08~03.09	Organized the 1st Certified International Investment Analysts (CIIA) Foundation and Final Examinations for 2024

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03.12~06.20	Organized 17 sessions of the 2024 New Approach to Financial Planning Seminars for Military Personnel, under the commission of TDCC
03.14~12.12	Organized 20 sessions of Money Management General Education for College Students
03.16	Held a tree-planting activity in support of ESG initiatives in the Leshui Village, Datong Township, Yilan
03.21~04.24	Arranged the Workshop for New Disclosure Requirements on Shareholders of TWSE- and TPEX-Listed Companies with 5% Shareholding or More, under the commission of TPEX
03.22	Collaborated with the Andrew Charity Association to organize a one-day volunteer event
03.22~11.29	Organized the 2024 New Financial Knowledge of Asset Management and Legal Compliance Series Seminar, covering three sessions on the following topics: Understanding COP28: Guiding Taiwan's Promotion of Sustainable Finance Seminar, Enhancing ETF Supervision Measures and Diversifying Asset Market Development, and Sustainable Future: Carbon Management Trends and Practices in the Financial Industry
03.29	Organized the 2nd Promotional Conference on Sustainable Finance Evaluation
04.01~06.24	Organized the 2024 Financial Sustainable Development Talent Cultivation Class, including three modules: International Standards and Investment, Climate Governance and Carbon Management, and Sustainability Disclosure and Risk Management
04.01~06.30	Signed a memorandum for licensing examination and promotional collaboration with National Kaohsiung University of Science and Technology, Chaoyang University of Technology, and I-Shou University, respectively
04.02~06.18	Organized the 2024 SFI GoProS Training Program - Domestic Training
04.09~11.28	Organized 30 sessions of the Financial Management onto the Campus Lecture Series, under the commission of TDCC
04.11~04.12	Organized the 1st Licensing Examination for Hong Kong Securities and Futures Intermediaries for 2024
04.12~11.18	Organized the 2024 Financial Technology Capacity Building Training Program, including 4 subjects, Digital Marketing Strategies, Big Data Analysis, Legal Compliance Technology and Risk Management Application, and Artificial Intelligence
04.13~04.18	Conducted an overseas delegation to Japan focused on net zero and sustainability

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04.14	Organized the 1st professional subject examination on securities, securities investment trust and consulting, and futures, and internal control basic competency examination for 2024, and administered the Basic Test on Sustainable Development for the first time
04.15~10.15	Conducted the 2024 Practical Course on Financial Information Security, including 4 modules: Trends and Governance Standards in Financial Information Security, Key Points in Financial Information Security Audits, Cloud Security and Zero Trust Architecture & Protection, and Vulnerability Management and Incident Response Handling
04.17~10.17	Arranged 30 sessions of the Financial Literacy Program 2024: Investing for the Future Lecture Series, under the commission of the Securities and Futures Bureau, FSC, and held the Young Experts in Sustainable Finance Management children's financial camp on May 24
04.22~04.26	Assisted the Financial Supervisory Commission in organizing the 2024 U.S. Securities and Exchange Commission Regional Exchange Training
04.25~12.05	Arranged 50 sessions of the 2024 Financial Literacy Program: Investing for the Future Lecture Series, under the commission of Taiwan Stock Exchange
04.26	Hosted the SFI 40th anniversary celebration, titled 40 Years of Securities Excellence, Charging Toward Sustainability, along with the seminar Sustainable Transition, Achieving New Heights
05.03~06.21	Arranged the 2024 Sustainability Disclosure Promotion Seminar for TWSE- and TPEX-Listed Companies, under the commission of TWSE (3 sessions)
05.03~06.28	Organized the Futures Online Promotional Game with Prizes
05.10~10.09	Arranged the 2024 Online Financial Elite Camp for Junior College Students, under the commission of TPEX
05.14~07.04	Organized the Futures Specialist Training Program, under the commission of TAIFEX (5th)
05.2~06.21	Arranged the 2024 Sustainability Disclosure Workshop for TWSE- and TPEX-Listed Companies, under the commission of TWSE (3 sessions)
05.21-05.22	Organized an outreach course for prosecutors and investigators on Futures and Options Market Trading Practices and Case Studies (11th)
05.22-12.19	Held in-person educational seminars on Mutual Fund Financial Management and Investment Fraud Prevention (10 sessions on campuses and 10 sessions in local communities)
05.31~06.21	Organized the 106th Securities and Futures Market Regulations and Case Studies Seminar (for judges, court clerks, administrative officers, and judicial assistants)

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06.03	Organized the 2024 Forum on Institutional Investor Perspectives, under the commission of TWSE
06.03~06.07	Organized the 105th Securities and Futures Market Regulations and Case Studies Seminar (for prosecutors and investigators)
06.03~07.31	Organized the financial knowledge online promotion game, Exploring the Depths of Financial Knowledge with TFSR, under the commission of the Taiwan Financial Services Roundtable
06.11~06.16	Collaborated with the Securities Investment Trust & Consulting Association to organize the 2024 Delegation to Singapore on S-REITs, Private Equity Funds, and Wealth Management
06.13~10.31	Organized the Promotional Campaign on Expert Opinion and Celebrity Experience Sharing of Money Management, with 3 column articles published, and 5 episodes of podcast broadcasted
06.15、12.07	Jointly held the 2024 Financial Services Caring Carnival with the Taiwan Financial Services Roundtable (in Tainan and Taipei)
06.19	SFI signed a memorandum of understanding with the Asian Institute of Digital Finance at the National University of Singapore
06.20~07.29	Held the 2024 Sustainable Finance Certification Training Program - Foundation-Level Course for the first time (1st and 2nd)
06.22~10.05	Organized 5 large-scale promotional events on 2024 New Investment Trends, with livestreaming
06.24~11.22	Arranged 20 sessions of the 2024 Futures and Options Promotional Lectures, under the commission of TAIFEX
07.01~09.30	Signed a memorandum for licensing examination and promotional collaboration with Feng Chia University, Asia University, Yuan Ze University, National Yunlin University of Science and Technology, Shu-Te University, National Chiayi University, and Overseas Chinese University, respectively.
07.05~08.23	Organized an outreach course for judges and court clerks on Futures and Options Market Trading Practices and Case Studies (4 sessions in total, including Taipei, Taichung, Tainan, and Kaohsiung)
07.05~08.30	Organized the 8th 2024 ALPHA+ Training Program for Asset Management - 1st Phase Domestic Training, including two modules: Investment & Risk Management and Innovation & Marketing

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07.09~07.17	Organized the Training Program for Key Industry and Securities Underwriters, including 2 modules: Key Industry Audits and Valuation
07.10	Organized the 2024 Forward-Looking Forum Series - Enhancing the Core Value of Financial Services through AI Guidelines
07.18~08.21	Organized the 2024 Advanced Wealth Management Specialist Training Workshop - Domestic Training, including 4 modules: Family Succession and Family Office Practices for High-Net-Worth Families, Securities Trusts as Effective Tools for Wealth Planning, Design of Investment Products for High-Net-Worth Wealth Management, and Client Relationship Management and High-Net-Worth Client Engagement and Asset Allocation Practices
07.18~11.04	Held the 2024 Sustainable Finance Certification Training Program – Advanced Course for the first time, including 4 modules: Sustainable Development Supervision and Governance, Greenhouse Gas Management, Sustainability Disclosure, Sustainable Investment, Financing, and Insurance, and Sustainability Risk Management
07.19	Passed the full organizational audit for ISO CNS27001:2013 and obtained certification
07.19~07.26	Arranged the Securities and Futures Industry (Including Introducing Brokers) Legal Compliance Promotional Conference (1 in-person session and 1 online session)
07.27~08.25	Arranged the 2024 U of T International English Program, an overseas English communication course
08.01~12.31	Organized the Anti-Investment Fraud Essay Contest, under the commission of TWSE, TAIFEX, and TPEX
08.02~08.03	Organized the Training Program for Green and Sustainable Finance (4th)
08.04	Organized the 2nd professional subject examination on securities, securities investment trust and consulting, and futures, and internal control basic competency examination for 2024
08.07~10.04	Organized the 2024 Financial Services Risk Management Talent Cultivation Class for the first time, including 2 modules: Fundamentals of Risk Management and Practical Analysis of Risk Management
08.09~08.30	Organized the 107th Securities and Futures Market Regulations and Case Studies Seminar (for judges, court clerks, administrative officers, and judicial assistants)
08.16~12.19	Organized the 2024 International Asset Management Symposium, including two forums: Future Financial Investment Trends x New AI Perspectives and New Trends in Asset Management in Asia

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8.30	Co-organized the Yangde Good Neighbor Blood Donation Event at the Nanhai Blood Donation Center in collaboration with the Export-Import Bank of the Republic of China and the Central Deposit Insurance Corporation
09.01~09.12	Organized the 2024 Overseas Delegation for Senior Executives in Asset Management to the United States to explore international trends in asset management
09.03~12.17	Organized the Interdisciplinary Financial Analysis master's degree course for the 2024 academic year
09.06~10.18	Organized the 2024 Insider Trading Prevention Information Session, under the commission of TWSE (4 sessions)
09.11~09.12	Organized the 2nd Licensing Examination for Hong Kong Securities and Futures Intermediaries for 2024
09.11~12.25	Organized the International Investment Analysis master's degree course for the 2024 academic year
09.12~11.01.02	Organized the Asset Management Big Data and Algorithm Application Practices master's degree course for the 2024 academic year
09.13~12.27	Organized the ESG Sustainable Investment and Green Finance Innovation Credit Course for the 2024 academic year
09.18	Organized the 2024 Forward-Looking Forum Series - Expanding ETF Product Diversity and Jointly Establishing an Asian Asset Management Hub
09.20~09.21	Organized the 2nd Certified International Investment Analysts (CIIA) Foundation and Final Examinations for 2024
09.20~12.18	Arranged 4 sessions of 2024 In-Person Campus Lecture on Financial Education of Universities
09.21~10.01	Organized the 2024 SFI GoProS Training Program - Overseas Visit
09.24~12.24	Arranged the Knowledge is King: 21th Grand Contest on Investment Securities for University Students, including the online qualifying, regional semifinal, and final rounds, under the commission of TWSE
10.01~12.31	Signed a memorandum for licensing examination and promotional collaboration with Chinese Culture University, National Formosa University, Minghsin University of Science and Technology, National Central University, Ming Chuan University, CTBC Business School, and National Taipei University of Technology, respectively

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10.06	Organized the 2024 Understanding Asset Management Market Practices Course for judicial officers
10.07~10.13	Participated in the World Investor Week 2024, which was organized by the International Organization of Securities Commissions (IOSCO) and the FSC
10.25~11.29	Arranged the Insider Equity Transfer and Legal Compliance Promotional Conference 2024 under the commission of TWSE (5 sessions in total, in-person and online)
10.26	Organized the 2024 New Trends in CFTC Derivatives Regulations Seminar
10.26~10.31	Organized the 2024 Advanced Wealth Management Specialist Training Workshop - Overseas Delegation to Japan Focused on Financial Services for the Elderly and Family Business Succession
10.29~11.22	Organized the Sustainability Disclosure Practical Training and Promotional Conference for TPEX-Listed Companies, under the commission of TPEX (3 sessions)
10.29~12.26	Arranged the Futures Asset Management Personnel Training Program under the commission of TAIFEX (12th)
10.29~12.26	The 2024 Asia Regional Finance and Financial Innovation and Transaction Credit Courses were held in Taichung
11.01	Organized the 2024 Understanding Asset Management Market Practices Course for prosecutors and investigators
11.02~11.13	Organized the 8th 2024 ALPHA+ Training Program for Asset Management - 2nd Phase Overseas Study (United Kingdom)
11.07~12.03	Organized the Promotional Conference on Sustainability Report Preparation and Functional Role for TWSE- and TPEX-Listed Companies, under the commission of TWSE and TPEX (5 sessions)
11.13	Organized the seminar Enhancing Personal Value and Career Potential with the CIIA Certification
11.16	Organized SFI's one-day environmental education activity in Xingjian Village, Sanxing Township, Yilan
11.19~12.04	Organized the Deepening Corporate Sustainability Governance Culture: Sustainable Development Committees and Chief Sustainability Officers Roundtable, under the commission of TWSE and TPEX (2 sessions)
11.21	Arranged the 2024 New Trends for Investors of Asset Management forum



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Date	Event
11.23~12.02	Organized a delegation to Australia focused on financial technology
11.26	Published the 2024 White Paper on Financial Policy Recommendations
12.01	SFI's official website was revamped and upgraded with cloud services
12.01	Organized the 3rd professional subject examination on securities, securities investment trust and consulting, and futures, the internal control basic competency examination, the 4th Professional Exam for AML/CFT Specialists, and the 5th Basic Test on Sustainable Development for 2024
12.04	Held the award ceremonies for the 2023 Outstanding Paper Awards and the 14th Best Securities and Futures Paper Awards of the Review of Securities and Futures Markets
12.10	Co-organized a one-day volunteer activity at the Nanhai Blood Donation Center in collaboration with the Export-Import Bank of the Republic of China and the Central Deposit Insurance Corporation
12.24~12.27	Held the Securities Industry Legal Compliance Promotional Conference (3 sessions in total, including securities, investment trusts and investment advisors)
12.25	Organized the seminar Leveraging Derivatives to Expand Asia's Asset Management Footprint for TWSE- and TPEX-Listed Companies, under the commission of TAIFEX
12.26	Organized the 2024 Asset Management Internship and Career Development Expo