

2025 Chronology

Date	Event
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 online seed teacher training camps for both junior high school and senior high/vocational school teaching plans. In July, the teaching plans were made available for teachers to apply for and use, along with the promotion of their classroom implementation
02.01~12.31	Organized 5 sessions of the University Capital Market Specialized Practical Courses
02.03 ~ 10.31	Signed a memorandum for licensing examination and promotional collaboration with Ling Tung University, Shih Chien University, Chihlee University of Technology, Fu Jen Catholic University, National Taipei University, and National Chung Cheng University
02.06~12.27	Organized 74 sessions of the 2025 Bringing Financial Literacy to Your Home Seminar - VAC Project, under the commission of the Taiwan Financial Services Roundtable
02.14	Organized the Promotional Conference on the 2025 Assessment of Treating Customers Fairly Principles
02.19~06.11	Organized the 2024 Financial Innovation and Transaction Credit Courses (Tainan class), under the sponsorship of TWSE, TAIFEX, and TDCC
02.23~08.28	Organized 15 sessions of the 2025 In-Depth Financial Knowledge Seminar, under the commission of the Taiwan Financial Services Roundtable
02.26~05.28	Organized the 2024 academic year credit course International Finance Seminar
03.01~12.31	Organized the 2025 Mutual Fund Television and Online Media Promotion, and produced and broadcast 8 television programs
03.04~03.13	Organized the 2025 Corporate Governance Evaluation Information Session (6 sessions), under the commission of TWSE and TPEX
03.05	Organized the 2nd Sustainable Finance Evaluation Awards Ceremony
03.05 ~ 11.17	Organized campus promotion and outreach lectures for professional certifications, with a total of 25 sessions
03.05~11.06	Organized 20 sessions of Money Management General Education for College Students
03.05~12.15	Organized 30 sessions of the Financial Management onto the Campus Lecture Series, under the commission of TDCC
03.06~11.26	Organized the 2025 New Financial Knowledge of Asset Management and Legal Compliance Series Seminar, covering 4 sessions on the following topics: New Regulatory Framework for Active ETFs and Talent Development for Active Management, Practical Applications of AI in the Financial Industry and Cybersecurity Risk Management, Aligning with International Standards: Expanding New Trends in External Asset Management, and Prospects and Practical Discussions on RWA Tokenization

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03.07 ~ 09.20	Organized the 2nd Certified International Investment Analysts (CIIA) Foundation and Final Examinations
03.17~06.19	Organized the 2025 Sustainable Finance Certification Training Program - 2 sessions of the Foundation-Level Course and 3 sessions of the Advanced Course (including the modules on Sustainable Development Regulation and Governance, Sustainable Investment, Financing and Insurance, Greenhouse Gas Management, Sustainability Disclosure, and Sustainable Risk Management)
03.18~09.23	Organized 20 sessions of the 2025 New Approach to Financial Planning Seminars for Military Personnel, under the commission of TDCC
03.19~03.20	Co-organized a blood donation drive at the Nanhai Blood Donation Center in collaboration with the Export-Import Bank of the Republic of China, the Central Deposit Insurance Corporation, the Taiwan Clearing House, and the Taiwan Insurance Institute
03.20~05.29	Organized, for the first time, 6 sessions of the 2025 Sustainability Disclosure Implementation and Promotion Seminar for TWSE- and TPEX-Listed Companies, under the commission of TWSE and TPEX
03.25~08.05	Organized the 2025 Training Program on Enhanced English Communication, including 2 sessions: English for Social Situations and Meetings
03.29 ~ 12.27	Organized recruitment for new personnel under the commission of 5 institutions: TPEX, BankTaiwan SECURITIES, Taiwan Financial Holdings Co., Ltd., TWSE, and TDCC
04.07~11.10	Organized the 2025 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
04.09~07.09	Organized 10 sessions of the Financial Literacy Lecture Series for Seniors, under the commission of TDCC
04.11~06.30	Organized the 2025 SFI GoProS Training Program - 1st Phase Domestic Study
04.13 ~ 08.03 ~ 1	Organized 3 sessions of the professional subject examinations on securities, securities investment trust and consulting, and futures, as well as the internal control basic competency written examination; 2 sessions of the Sustainable Development Basic Competency Test written examination; and 1 session of the AML/CFT Specialist written examination
04.14~10.14	Organized the 2025 Practical Course on Financial Information Security, with 4 modules including: Trends and Governance Standards in Financial Information Security, Cybersecurity Risk Management and Audit Practices, and Cybersecurity Incident Response and Handling, Cloud Security, and Vulnerability Management
04.16	The Review of Securities and Futures Markets received 2 Recommended Outstanding Paper Awards at the 15th UMC Management Thesis Awards
04.16~9.21	Organized 30 sessions of the Financial Literacy Program 2025: Investing for the Future Lecture Series and held the Young Experts in Sustainable Finance Management children's financial camp on June 10

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04.26~12.06	Organized 50 sessions of the 2025 Financial Literacy Program: Investing for the Future Lecture Series, under the commission of TWSE
04.28	The Review of Securities and Futures Markets received the Long-Term Dissemination Award at the launch event of the 2024 Report on the Impact of Taiwan's Academic Resources organized by the National Central Library
04.28~07.03	Organized, for the first time, the IFRS S2 (Climate-Related) Disclosure Workshop, under the commission of TPEX and other institutions
04.30	Organized the Online Promotional Conference on the 3rd Sustainable Finance Evaluation for the Securities and Investment Trust Industries
05.01~11.13	Organized the selection process for the 18th Golden Goblet Awards of the Republic of China, and held the awards ceremony on November 13
05.02~10.03	Organized the 2025 Insider Trading Prevention Information Sessions (4 in-person sessions and 2 online sessions), under the commission of TWSE
05.10~10.09	Organized the 2025 Online Financial Elite Camp for Junior College Students, under the commission of TPEX
05.16~6.27	Organized the Little Sustainability Expert Children's Financial Literacy Camp, with a total of 3 sessions
05.17~05.23	Organized the 2025 Advanced Wealth Management Specialist Training Workshop - Overseas Study (Singapore)
05.20~07.12	Organized the Futures Specialist Training Program (6th), under the commission of TAIFEX
06.02~06.06	Organized the 109th Securities and Futures Markets Regulations and Case Studies Seminar (for prosecutor investigators)
06.06、08.22	Organized 2 sessions of the 2025 International Asset Management Symposium: The Rise of Asset Management in Asia and Taiwan's Development Prospects and Building an Asian Asset Management Center: Financial Technology Innovation and Risk Management in Asset Management
06.12	Organized the 11th Corporate Governance Evaluation Awards Ceremony
06.20、09.26	Organized two sessions of the 2025 Asset Management Prospect Series - "Promoting Financial Support for Industry to Achieve an Orderly Net-Zero Transition" and "Applying AI in Finance to Deepen Financial Inclusion."
06.21~11.15	Organized 5 large-scale promotional events on 2025 New Investment Trends, with livestreaming
06.21~9.30	Organized the promotion of the Expert Opinion column, with a total of 4 articles published
06.22~10.03	Organized 10 sessions of in-person educational seminars on Mutual Fund Financial Management and Investment Fraud Prevention
06.23~06.30	Organized, for the first time, the Futures and Options Training Camp for University Faculty

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06.24~09.09	Organized, for the first time, the 2025 Flagship Program for Asset Management Talent Development, with courses including 4 modules: ETF Practices and Regulatory Mechanisms, REITs Trends and Opportunities, Contemporary Financial Risk Issues, and RWA Financial Technology
07.01	Officially launched the computer-based Sustainable Development Basic Competency Test
07.01~07.03	Organized a carnival event on the theme of Financial Fraud Prevention Awareness (Taipei), under the commission of the Taiwan Financial Services Roundtable
07.01~08.31	Organized an online financial literacy promotional game event titled Gold Panning Fun along the Taiwan Financial Services Roundtable River, under the commission of the Taiwan Financial Services Roundtable
07.01~12.31	Compiled and published the Mutual Fund Financial Literacy Picture Book
07.05~08.30	Organized the 9th 2025 ALPHA+ Training Program for Asset Management - 1st Phase Domestic Study, including two modules: Investment & Risk Management and Innovation & Marketing
07.10~10.27	Organized, for the first time, the Futures and Options Trading Practices and Market Misconduct Case Studies Seminar for Judicial Personnel and Prosecutorial Investigators, with 4 cohorts for judicial personnel and 2 cohorts for prosecutor investigators
07.15	Passed the full organizational audit for ISO CNS 27001:2022 and obtained Chinese and English certificates
07.17	SFI's Ximen Office on the 6th floor was inaugurated and officially opened
07.19~08.17	Organized the 2025 U of T International English Program, an overseas English communication course
07.25~11.21	Organized the 2025 Insider Equity Transfer and Legal Compliance Promotional Conference (4 in-person sessions and 2 online sessions), under the commission of TWSE
08.01 ~ 12.29	Launched a qualified electronic certificate service for the securities, futures, and securities investment trust and consulting professional qualification examinations, as well as the bond and shareholder services personnel competency examinations, the Sustainable Development Basic Competency Test, and the AML/CFT Specialist examination
08.01~08.29	Organized the 110th Securities and Futures Markets Regulations and Case Studies Seminar (for judges, officials, and clerks, and judges' assistants)
08.06	Signed a memorandum of understanding on national cybersecurity joint defense and intelligence sharing with the Ministry of Justice Investigation Bureau
09.01	Launched a new digital learning platform

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Date	Event
09.01~09.12	Organized the 2025 Overseas Study for Senior Executives in Asset Management (including visits to Stockholm, Sweden and Copenhagen, Denmark)
09.02~12.16	Organized the Interdisciplinary Financial Analysis master's degree course for the 2025 academic year
09.03~09.09	Organized the Training Program for Key Industry and Securities Underwriters, including two modules: Key Industry Inspection and Key Industry Evaluation
09.05~12.19	Organized the ESG Sustainable Investment and Green Finance Innovation Credit Course for the 2025 academic year
09.12~115.01.12	Organized the 2025 academic year credit course AI Application Planning and Financial Technology Practice
09.15~115.01.12	Organized the Asset Management Big Data and Algorithm Application Practices master's degree course for the 2025 academic year
09.15~12.31	Organized the 2025 Financial Literacy Promotion for the Younger Generation, with a total of 109 sessions (continuing into 2026), under the commission of the Taiwan Financial Services Roundtable
09.16	Co-organized a volunteer activity at the Andrew Charity Association Food Bank in collaboration with the Export-Import Bank of the Republic of China and the Central Deposit Insurance Corporation
09.18~12.18	Organized the International Investment Analysis master's degree course for the 2025 academic year
09.19、12.16	Organized the 2nd Licensing Examination for Hong Kong Securities and Futures Intermediaries
09.19~12.26	Organized the 2025 Asia Regional Finance and Financial Innovation and Transaction Credit Courses (Taichung class)
09.20~10.10	Organized the 2025 SFI GoProS Training Program - 2nd Phase Overseas Visit (United Kingdom and Ireland)
09.30~11.20	Organized 5 Warrants Information Sessions, under the commission of TWSE
10.03~11.28	Organized the 111th Securities and Futures Markets Regulations and Case Studies Seminar (for judges, officials, and clerks, and judges' assistants)
10.15	Organized the 2025 New Trends for Investors of Asset Management forum (Chiayi)
10.15~10.17	Organized the 112th Securities and Futures Markets Regulations and Case Studies Seminar (for prosecutors)

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10.16	Assisted the competent authority in organizing the 15th Taipei Corporate Governance Forum
10.23	Held the award ceremonies for the 2024 Outstanding Paper Awards of the Review of Securities and Futures Markets
11.01~10.16	Organized 2 sessions of the 2025 Understanding Asset Management Market Practices Course for judicial personnel and prosecutor investigators
11.04	Organized the Award Ceremony for Outstanding Institutions in the 2025 Assessment of Treating Customers Fairly Principles
11.06-11.07	Organized the Training Program for Green and Sustainable Finance (mid- to senior-level executive class)
11.08	Jointly organized the 2025 Financial Services Caring Carnival (Chiayi) with the Taiwan Financial Services Roundtable
11.08~11.09	Organized the 9th 2025 ALPHA+ Training Program for Asset Management - 2nd Phase Overseas Study (Germany and Switzerland)
11.12~12.09	Organized the Knowledge is King: 22nd Grand Contest on Securities Investment for University Students, including the online qualifying round, the Taipei semifinal, and the final round, under the commission of TWSE
11.20	Organized the Promotional Conference on the 2026 Assessment of Treating Customers Fairly Principles
12.05~12.17	Organized the seminar New Corporate Hedging Strategies: Addressing Exchange Rate Challenges and Asset Management Trends, under the commission of TAIEX
12.17	Produced and broadcast an expert interview video titled CIIA Certification: Opening the Door to International Investment
12.19	Organized, for the first time, the 2025 Asset Management Site Visit and Career Exploration Program
12.23~12.30	Organized the Securities Industry Legal Compliance Promotional Conference (including 3 sessions covering the securities, investment trust, and investment consulting sectors)