



Airline Ambassadors
INTERNATIONAL



Building Financial Skills

A Key Enabler for Sustainable Development

Global, Collaborative, AI Powered

July. 16th, 2024

Confidential and for discussion only



A Short Self Intro.



Lee Tian

- Managing Partner of NYIF International Holding LLC, the Chairman and CEO of the New York Institution of Finance (NYIF),
- **Board Member, and Treasurer of Airline Ambassadors International (AAI)**
- Mr. TIAN also serves as independent board directors of two Hong Kong listed Financial Institutions
- For the past 25 years, Mr. Tian has been focusing on investment banking business in the financial sector, particularly in the areas of corporate restructuring and cross-border mergers and acquisitions.
 - ✓ Executive Director and Head of Financial Institutions for ABN AMRO Group (Asia-Pacific),
 - ✓ Executive Director and Head of Financial Institutions for Bank of China International (HK)
 - ✓ Senior Manager at the Investment Banking Division of JPMorgan Chase Bank (New York)
- During his investment banking career, Mr. Tian has led and participated in many M&A and IPO projects with a total transaction amount exceeding \$20 billion.
- Mr. Tian received an MBA from the Fuqua School of Business of Duke University and his MS in Civil Engineering from Cleveland State University.

Discussion Outline

- **ABOUT NYIF : A Short Brief Introduction**
- **DESCRIPTION: NYIF Programs for Building Financial Skills**
 - i. Pre-College Programs: Financial Education for Young Generation
 - ii. Micro Certificates - A Rapid Learning Program for Working Class and Entrepreneur
 - iii. Professional Certificates
- **REFLECTION ON AI : Challenges and Opportunities**
- **A GLOBAL INITIATIVE: Provide world-class financial education by leveraging on AI**



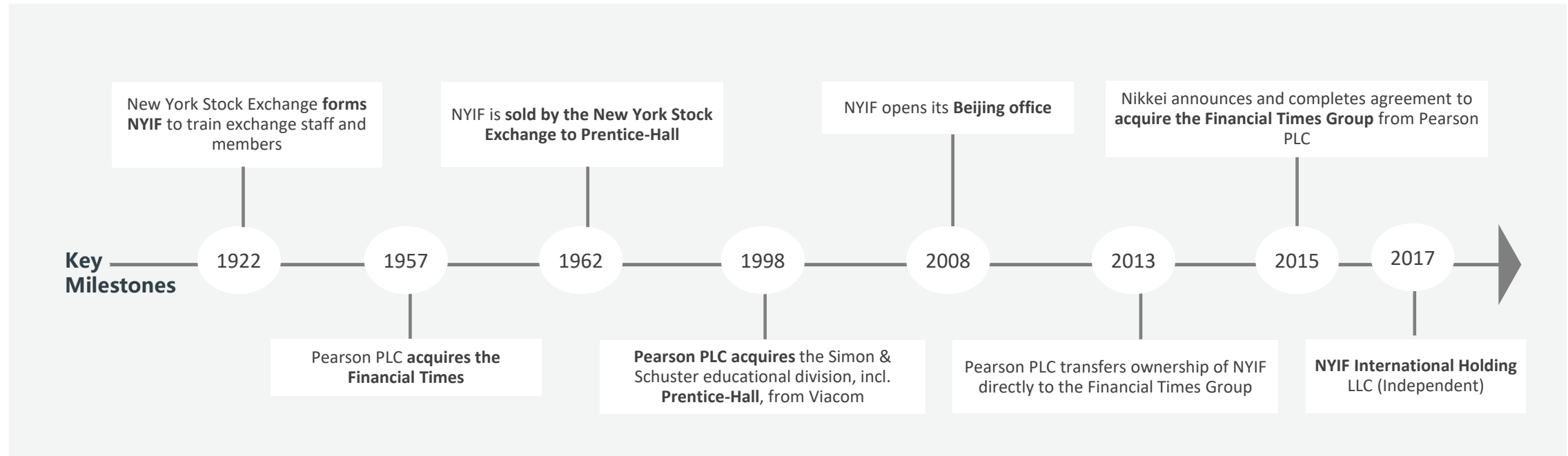
A Short introduction of New York Institute of Finance (NYIF)



Founded by NYSE in 1922

- It was founded that year to provide financial training to NYSE employees, Wall Street financial institution professionals and public company executives;
- It is now the world's leading provider of financial career training, with more than 1.3 million alumni in more than 125 countries after nearly 100 years of growth.

➤ Founded in 1922 by the New York Stock Exchange, training staff and members



Founded by NYSE, Deeply rooted in Wall Street history.
NYIF is a leading financial education institution training students worldwide...

100 Years
track record

> 1.3 million
successful Alumni



Warren
Buffet



Robert Lynch
Global Macro Strategist



Joel Levington
Global Director of
Fixed Income Research



James Crosson
Vice President,
API Product Manager

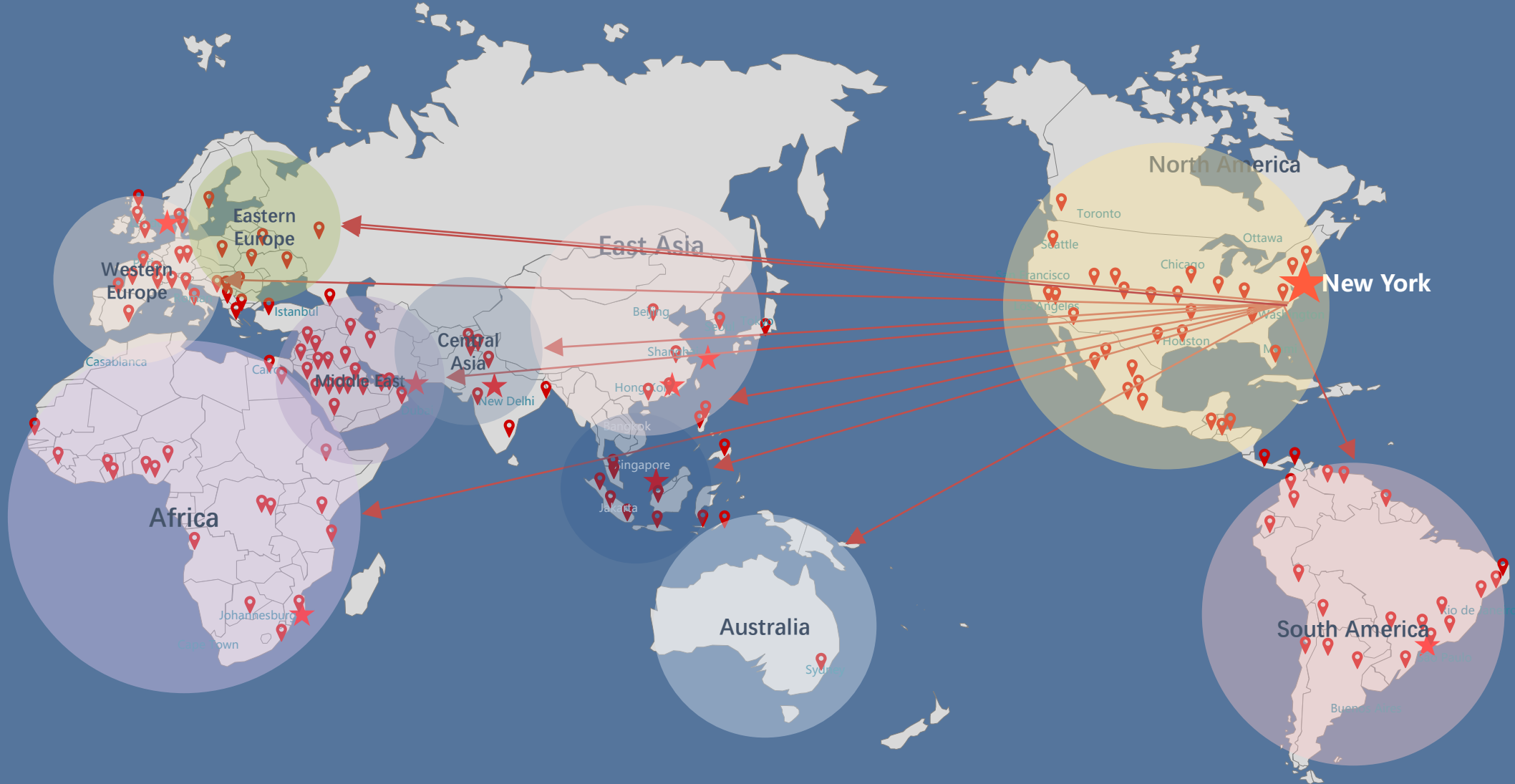


Global presence, and brand recognition



Wide range and diverse set of public, private, and education partners

Global Coverage – Serve Clients from 125 Countries



Some Selected Global Clients and Partners





NYIF Faculty

(some selected names)



Tracy Williams
Work exp.: 40+ Yrs.



Jack Foster
Work exp.: 40+ Yrs.



Douglas Carroll
Work exp.: 40+ Yrs..



Jeff Hooke
Work exp.: 40+ Yrs.



David Goldberg
35+ Years of Experience



Ralph Acampora
Work exp.: 40+ Yrs.



William Addiss
Work exp.: 40+ Yrs.



Rabinder Koul
Work exp.: 40+ Yrs.



Bernard Baumohl
Work exp.: 40+ Yrs.



Kenny Polcari
35+ Years of Experience



Chris Thomas
Work exp.: 25+ Yrs.



Lee Tian
Work exp.: 25+ Yrs.



Jack Farmer
Work exp.: 20+ Yrs.



Ram Seshadri
Work exp.: 25+ Yrs.



Dr. Jorge Cruz Lopez
Work exp.: 25+ Yrs.



Erik Tiltmann
Work exp.: 20+ Yrs.



Anton Theunissen
Work exp.: 20+ Yrs.



Manan Rawal
Work exp.: 20+ Yrs.



Wilfred Daye
Work exp.: 20+ Yrs.



Jerome Wong
Work exp.: 20+ Yrs.



Valisha Graves
Work exp.: 20+ Yrs.



Dr. Christiano Manfre
Work exp.: 20+ Yrs.



Chris White
Work exp.: 15+ Yrs.



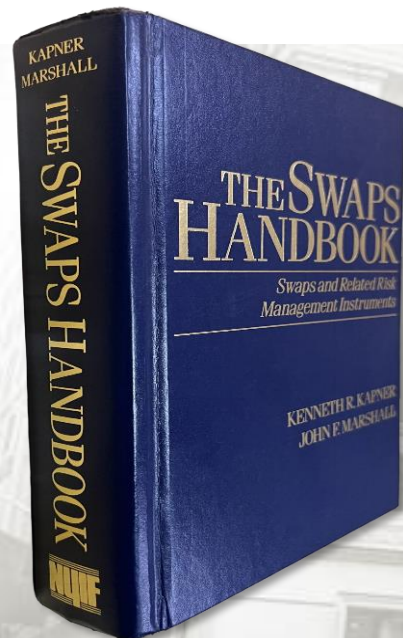
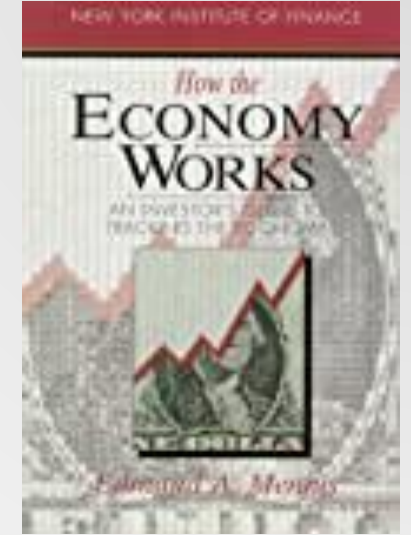
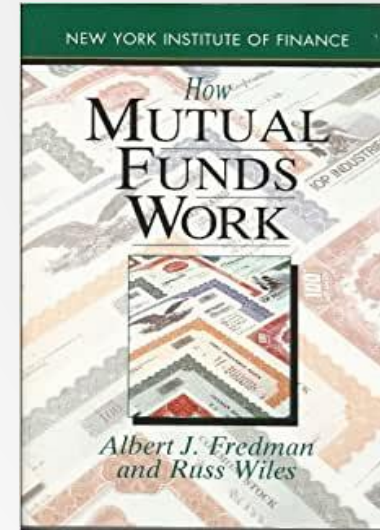
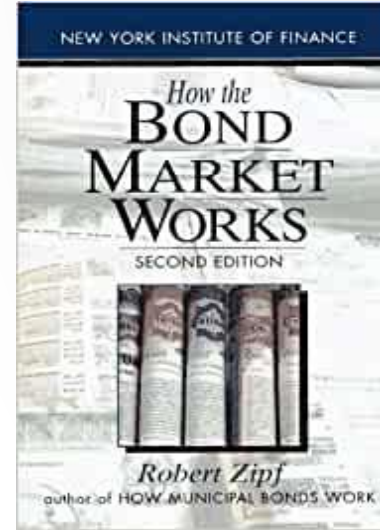
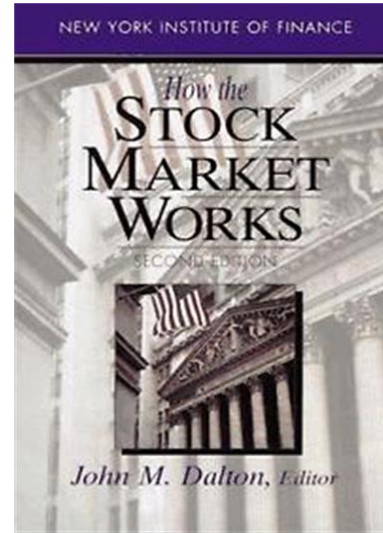
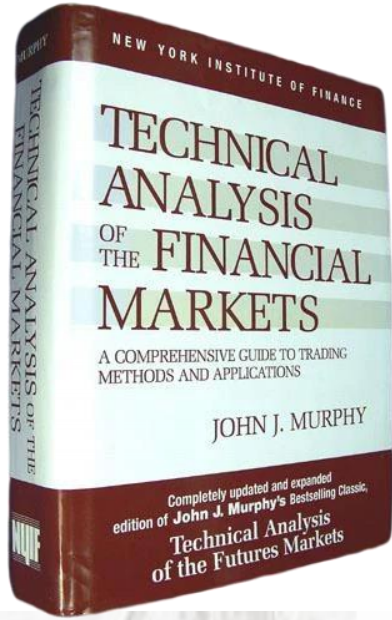
Jack C. Yuen
Work exp.: 15+ Yrs.



Dr. Sudeep Rathee
Work exp.: 15+ Yrs.



NYIF - A Publication Name for Many Finance Books



NYIF Education Programs for Building Financial Skills

1

K-12, Pre-College, and Community Education

- Programs on Economics, Finance, Entrepreneurship, Soft Skills, Personal growth and Ethics
- Comprehensive and Systematic introduction to key themes, concepts, and trends
- Mentor Establishment of **School level Finance and Entrepreneurship clubs**; foster local culture and expertise on these topics
- **Training of Trainers** at Community and School Level for developing local and long-term capacity to integrate and regularly teach these curriculum as part of school extracurricular learning
- NYIF to provide **curriculum, content, training, certifications, and mentors**

2

Micro certificates for rapid learning (self - paced / on demand)

- **Micro certificates** for high level understanding of key financial concepts ranging from basics of corporate finance, and capital markets to advance topics as portfolio Mgmt. and M&A
- All content **ready to roll out + easy to integrate / consume** SOCRM and digital format
- **Fit for short-term, rapid learning**, and ideally suitable for young workers and SME entrepreneurs
- NYIF to provide curriculum plan and additional practice assignments + qualification tests to make these micro certificates eligible for **microcredits under College / University system**

3.

Professional Certifications for systematic upskilling and comprehensive learning (self - paced / on demand)

- A **shortlist of NYIF's most popular certifications** available in self-paced, digital learning format
- **Deep dive learning and proof-of-skill certifications** in major finance and investment topics
- Ideally **suitable for entry to mid-level executives and workers** looking to explore jobs in finance and investment functions
- NYIF to provide curriculum plan and additional practice assignments + final exam to make these certificates and modules eligible for **full credits under College / University system**

I. Pre-college Programs – Financial Foundation Education Program for Young Generations

Designed as a multi-dimensional, smart-learning, practical business, economic and financial skills development program

Increasing rigor →

I. Financial Foundation Education Pre-college Programs: Philosophy

G2020 YFS


NEW YORK INSTITUTE OF FINANCE

Next Generation of Business Leaders

Responsible Citizenship
 Life Quality, Vision, Goals


Professionalism, Ethics, Decency, Impact

Practical Skills, Expertise, Personal Growth, Career Ambition




Young Finance Scholar (YFS) Program

Foundations in Business, Economics, and Finance (YFS)



Deep Dive Learning, Soft Skills and Personal Growth Programs



Internship style Research and Coaching (YFS Advanced)



Volunteer and community service experience in a high-level, global initiative (Prosperity for All Initiative – the PAI)



I. NYIF Pre-college Programs: Sample

Young Finance Scholar (YFS) program: Foundations in Business, Economics and Finance

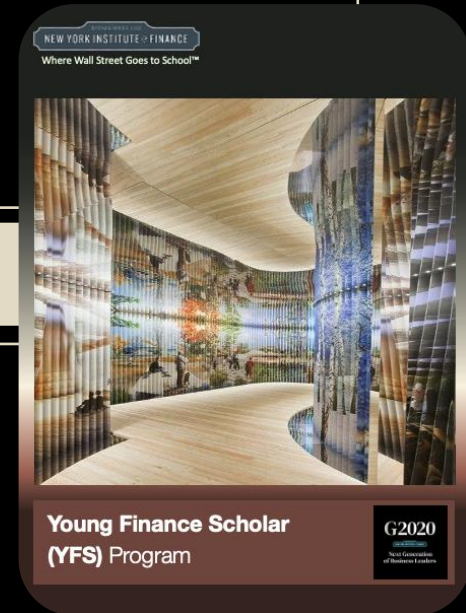
Finance for Personal Management and Career

- Theme 1: Developing a **Financial Quotient (FQ)** : financial quotient, life skills, and career
- Theme 2: **Saving and Planning** : Core competency for lifelong personal finance management
- Theme 3: Understanding Concepts of **Credit and Debt**
- Theme 4: Origin, Function, and Management of **Money**
- Theme 5: **Wealth** Creation

Live Lectures - Senior Practitioners as Faculty – Practical Projects

Finance, Economy, and Capital Markets

- Theme 6: Basic Concepts of the **Macro Economy**
- Theme 7: Basic Concepts of the **Micro Economy**
- Theme 8: Introduction to the **Financial System**
- Theme 9: Introduction to **Capital Markets**
- Theme 10: **Wall Street** and its Structure, Importance, and Functions



Contd.. : YFS program curriculum and topics

Finance,
Business,
Entrepreneurship
and Ethics

Theme 11: Types and **Structures of Companies and Organizations**

Theme 12: Start-ups : How to **Start a New Business ?**

Theme 13: Key Concepts of **Financial Statements** : Understand a Company from Financial Perspective

Theme 14: IPOs : How funds are raised through **IPOs ?**

Theme 15: Role and Importance of **Ethics in Business and Finance**

Financial Services
and
Emerging
Megatrends

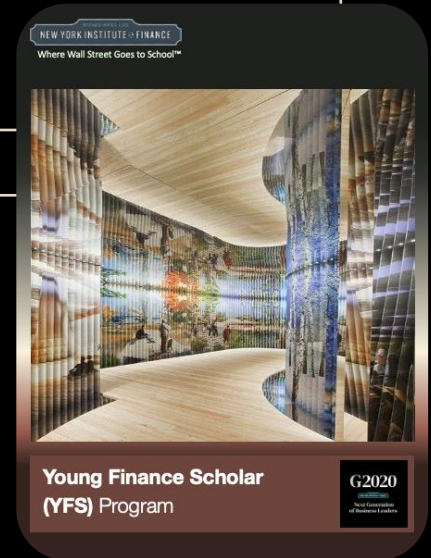
Theme 16: Commercial Bank and the **Credit System**

Theme 17: Insurance Industry

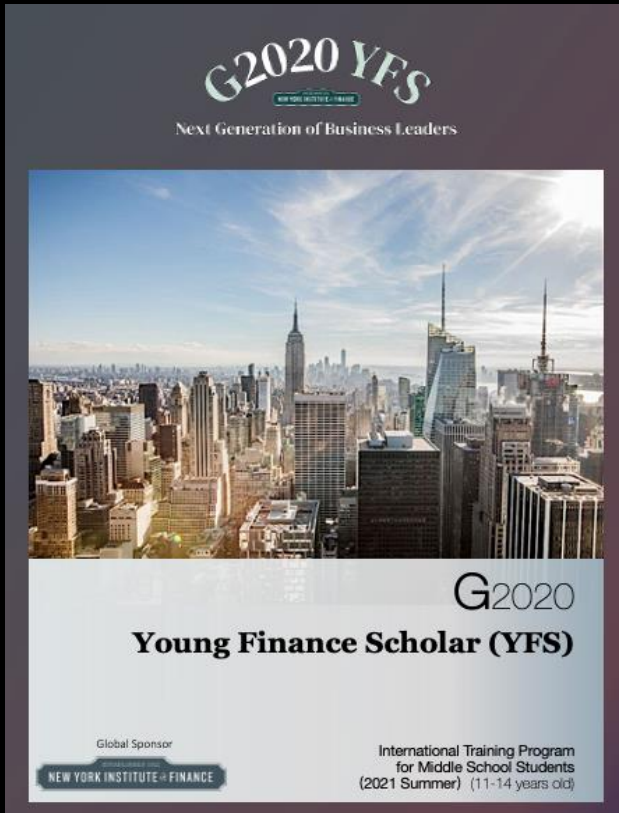
Theme 18: Corporate **Mergers & Acquisitions (M&A)**

Theme 19: Future of Finance – **Fintech and Digital Revolution** in Finance

Theme 20: Future of Finance – **ESG investing and Sustainable Finance**



Financial Training for Young Generation Case Study: Certificates in Youth Financial Education



Young Finance Scholar(YFS) Certificate

- Live online classes: 10 basic courses in business and finance
- 2 research projects (fund manager game; Sustainable Entrepreneurship)
- Online fund manager competition

The map highlights various global locations where the program is active, including London, Madrid, Riyadh, New Delhi, Mumbai, Singapore, Beijing, Shanghai, Hong Kong, Seattle, San Francisco, Los Angeles, Phoenix, Michigan, Detroit, Toronto, Boston, New Jersey, New York, and Florida. Australia is also highlighted in yellow.

YFS/YEA/PAI Global Alumni Network:

- In total, more than 2,000 students participated in the project in 2020-2023
- More than 50 schools from 19 countries and regions
- During the summer of 2020-2023, research projects, online competitions, and webcasts attracted more than 3,000 audience worldwide

The certificate is titled 'NEW YORK INSTITUTE OF FINANCE' and 'Where Wall Street Goes to School™'. It is a 'Certificate of Completion' for a 'Student's Name' who has successfully completed all required coursework of the 'G2020 Young Finance Scholar (YFS) Program for High School' during the period of 22 June 2020 to 18 July 2020. The certificate is signed by Dr. Sudheep Rathore, Director of the G2020 Young Finance Scholar (YFS) Program. It includes the date July 27, 2020, and the field of study: 'Specialized Knowledge and Application Instructional Method: Online Course'. It also lists the New York Institute of Finance's ID Number (101943), New York State Sponsor ID Number (022308), and New York Institute of Finance's address: 160 Broadway 15th Floor New York, NY 10038.



Young Equity Analyst (YEA) Program

- Students over 13 years old or graduates of YFS program. Suitable for:
- Students who plan to pursue professional study in business or finance or wish to pursue a career in this field
- Students who wish to gain global research and internship experience under the guidance of senior finance experts, or
- Anyone, regardless of age, who is interested in the stock market and wants to learn about stock trading in an easy-to-understand, fun and interactive way through case studies of well-known companies

Review of Summer Program

NYIF YFS Summer Program Student Background



I. Financial Training for Young Generation Case Study: Wall Street Stock Market & Investment Experience (boot camp)



- Two-week travel program with West Coast Connections for high school students to learn Finance at New York Institute of Finance in New York City
- Program used NYIF's Young Finance Scholar (YFS) curriculum and competitions – Fund Manager Game and M&A Project
- Over 200 students from around the U.S. and internationally in Summer 2021-2023

Academy of Continuing Education

NEW YORK INSTITUTE OF FINANCE
ESTABLISHED 1922

Start Young, Start NOW!

Young Finance Scholar (YFS)
Accelerated Certification Program

Age: 14-17

edu.lb | +961 9 547 254 Ext 2060 | mary.nakheul@lay.edu.lb

Review of Summer Program



Sustainability Start-up Idea Competition

Student acts as Founder of a Social Entrepreneurship Project to:

- Pick any one of the 17 UN Sustainable Development Goals (SDGs) for a business idea development
- Assume the role of entrepreneurs who want to create a digital start-up organization (a company or NGO) in that SDG related area to solve problems related to environment, social, or any other sustainable development issues
- Create a start-up – act as a founder, and will need to assume a key role
- Develop a pitchbook detailing: mission and vision, company registration, a broader business plan, board structure, fund raising, team responsibilities and hiring, list of various operations
- Present a one-year plan (1 page) describing plan of activities

Type	Simulated game
Role	Founder / Social Entrepreneurs
Format	Research report under expert guidance
Presentation and Competition	Presentation before the class, G2020 Research Committee and other audience
Assessment	Based on evaluation of the presentation performance with 30% weighting of audience and 70% weighting of Committee (cash and merit certificate awards)

I. NYIF Pre-college Programs : Sample Success Development Program (SDP)



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NEW YORK INSTITUTE OF FINANCE
 Since 1922 | 纽约金融学院

NYIF SUCCESS DEVELOPMENT PROGRAM

LEADERSHIP, EQ & COMMUNICATION SKILL CLASSES

(10 LIVE LECTURES + WEBINARS)

Lecture Series 1: Leadership and Communication

- ▶ Communication Skills for College & Career Preparation
- ▶ Presentation Skills & Public Speaking
- ▶ Principles of Success in Getting Accepted to College
- ▶ The Importance of Emotional Intelligence Development
- ▶ Personal Image & Business Etiquette

Lecture Series 2: Interview Strategy and Effective essay writing

- ▶ Uncovering your strengths: What makes you a winning candidate?
- ▶ Communicating your strengths: How to stand out among candidates
- ▶ Strategies for winning the interview
- ▶ Perfecting your presence
- ▶ Effective essay writing - How to effectively communicate interests and achievements in the essays

Workshop : College/Graduate School/Career Development

- ▶ Important factors for Ivy League and similar top university admission
- ▶ Power of extracurricular and leadership activities – Research projects / Internships
- ▶ Identifying career interests and selecting postgraduate programs
- ▶ Career development – Paths for becoming a successful professional

Note : The curriculum is indicative; the final order of the lectures and outlines with some modifications or enhancements can be determined by the New York Institute of Finance as is deemed suitable for the successful delivery of program and will be distributed to enrolled students.

Program Highlights

3 MODULES,
 10 LIVE LECTURES + WEBINARS

For high school, college & graduate students and young professionals

A group of world class experts help young people through live lectures:

- ▶ To further develop emotional quotient
- ▶ To build and exercise effective communication skills (verbal and written)
- ▶ Improve interview skills and enhance self-confidence and leadership

NYIF YFS PROGRAM – GLOBAL COHORTS LIST OF US SCHOOLS

Athenian School	USA, CA
BASIS Independent Brooklyn	USA, NY
Beckman High School	USA, Irvine
Briarcliff High School, NY	USA, NY
Brown University	USA, NY
Byram Hills School District	USA, NY
Capistrano Valley Christian School	USA, Irvine
Chenery Middle School	USA, MA
Clear Lake High School	USA, Huston
Cold spring harbor	USA, NY
Dalton	USA, NY
Detroit Country Day School	USA, MI
Diamond Bar High School	USA, Hacienda Heights
Eastern Middle School	USA, CT
Edgemont High School	USA, NY
Fernandina Beach High School	USA, FL
Greenwich Academy	USA, CT
Greenwich High School	USA, CT
Hamden Hall Country Day School	USA, CT
Horace Mann school	USA, NY

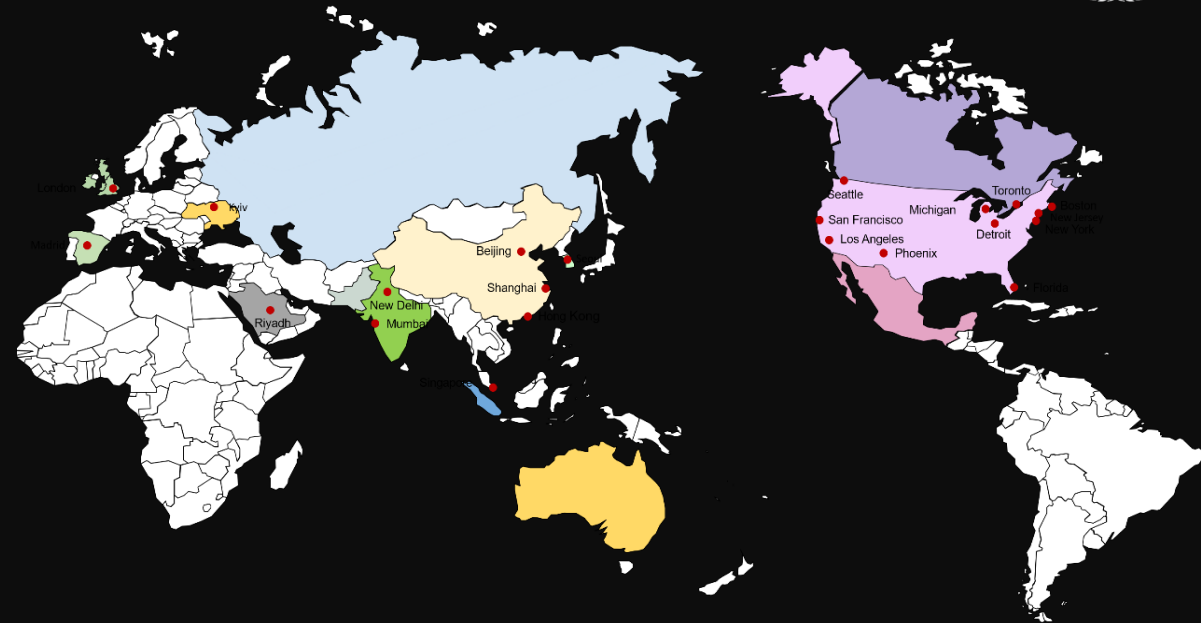
Immaculate Heart High School	USA, CA
Immaculate High School	USA, CT
Iona Prep	USA, NY
John Jay Middle School	USA, NY
Kellogg middle school	USA, WA
Lakeland Copper Beech Middle School	USA, NY
Lakeside School	USA, WA
Laurel School	USA, Ohio
Mater Dei High School	USA, CA
McNair academic	USA, NJ
Noble and Greenough School	USA, MA
Northwood High School	USA, CA
Phillips Academy	USA, MA
Red Mountain High School	USA, AZ
Ridgefield High School	USA, CT
Riverdale country school	USA, NY
Rye Country Day School	USA, NY
Rye High School	USA, NY
SAIL Homeschool	USA, NY
Santa Margarita Catholic High School	USA, CA

Scarsdale High School	USA, NY
Scarsdale Middle School	USA, NY
Shady Hill School	USA, MA
Shorecrest high school	USA, WA
Sierra Vista Middle School	USA, CA
St Junipero Serra Catholic School	USA, CA
St. Sebastian's School	USA, RI
Syosset High School	USA, NY
Tarbut V' Torah Community Day School	USA, CA
Tenafly High School	USA, NJ
The Bronx High School of Science	USA, NY
The Fessenden School	USA, CA
The Harker School	USA, CA
The Middlesex School	USA, MA
The Wheatley School	USA, NY
Upper Arlington High School	USA, Ohio
Walter Payton College Prep	USA, Chicago
William A. Shine Great Neck South High School	USA, NY
Winsor School	USA, MA

NYIF YFS PROGRAM – GLOBAL COHORTS LIST OF INTERNATIONAL SCHOOLS



Beijing No. Eight High School	Beijing
Qinghua Zhiqing High school	Beijing
Taft School	Beijing
UWC Changshu China	Changshu
English School attached to Guangdong University of Foreign Studies	Guangzhou
Ningbo Foreign Language School	Ningbo
Shanghai Adcote School	Shanghai
Shanghai American School	Shanghai
Shanghai High School International Division	Shanghai
Shanghai Hongwen School	Shanghai
Shanghai Nord Anglia School	Shanghai
Shanghai Qibao Dwight High School	Shanghai
Shanghai United International School Gubei Campus	Shanghai
Wellington College International Shanghai	Shanghai
YK PAO	Shanghai
SuZhou Foreign Language School	Suzhou
Nanwai King's College School	Wuxi
Chinese International School	Hongkong
Hong Kong International School	Hongkong
ISF (HONG KONG)	Hongkong
Victoria Shanghai Academy	Hongkong



St. Marcellinus Secondary	Canada, ON
TL Kennedy Secondary School	Canada, ON
The Scindia School	India, Gwalior
American School of Bombay	India, Bombay
The Doon School	India, Dehradun
Singapore International School, Mumbai, India	India, Mumbai
Pathways World School Aravali	India, New Delhi
Alfaris International School	Saudi Arabia, Riyadh
Singapore American School	Singapore
Shrewsbury school	UK, Shrewsbury
Pechersk School International Kiev	Ukraine, Kiev

I. NYIF Alumni into Top Universities (Some notables from 2000 - 2023)



Berkeley
UNIVERSITY OF CALIFORNIA



BROWN
UNIVERSITY



THE UNIVERSITY OF
CHICAGO



COLUMBIA
UNIVERSITY



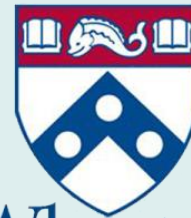
Massachusetts
Institute of
Technology



NEW YORK
UNIVERSITY



Yale
University



Wharton
UNIVERSITY OF PENNSYLVANIA



Washington
University
in St. Louis



II. Micro Certificates (Financial Business Micro Certificates ~ 5-8 hrs. duration) A Rapid Learning Program for Working Class and Entrepreneur

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NEW YORK INSTITUTE OF FINANCE
 WHERE WALL STREET GOES TO SCHOOL
 100 YEARS

Wall Street Finance Micro Certificate Programs

Trains You
 For How Things Will Be
 Not for How They Were™

www.nyif.com

- Corporate Finance Foundation**
- Financial Management Foundation**
- Financial Projection and Cash Flow Analysis**
- Business Valuation Foundation**
- Corporate Credit Analysis**
- Capital Market Foundation**
- Equity Foundation**
- Fixed Income Securities**
- Financial Derivative Foundation**
- Options Foundation**
- Asset Backed Securities**
- US Mutual Fund and Hedge Fund Introduction**
- Investment Portfolio Management Foundation**
- Wealth Management Foundation**
- M&A Foundation**
- M&A Structuring and Execution**
- Global Supply Chain Finance Foundation**
- Risk Management and Credit Analysis Foundation**

III. Professional Certificates (select shortlist)

Systematic Upskilling and Comprehensive Learning Programs

Chartered Investment Banking Analyst™ Designation	Investment Banking and Valuation Professional Designation	Capital Markets Professional Certificate
Mergers & Acquisitions Professional Certificate	Derivatives Professional Certificate	Advanced Derivatives Professional Certificate
Fixed Income Professional Certificate	Advanced Fixed Income Professional Certificate	Portfolio Management Professional Certificate
Advanced Portfolio Management Professional Certificate	Risk Management Professional Certificate	Advanced Risk Management Professional Certificate
Credit Risk Analysis Professional Certificate (Level I & Level II)	Graduate Financial Analyst (GFA) Certificate	Wealth Management Professional Certificate
Supply Chain Finance Certificate	Financial Accounting Professional Certificate	Financial Modeling Professional Certificate
Corporate Finance & Valuation Methods Professional Certificate	Quantitative Methods for Finance Professional Certificate	Data Analysis and Programming for Finance
Structured Finance Professional Certificate	Data Science for Finance Professional Certificate	Advanced Data Science for Finance Professional Certificate
Electronic Trading in Financial Markets Certificate	Micro Finance Professional Certificate	International Family Office Certificate
Young Finance Scholar (YFS) Certificate	Global Finance Analyst (GFA) Certificate	International Finance Risk Analysis (IFRA) Certificate
International Wealth Management Planner (IWMP) Certificate	CBA NYIF Joint Certificate	Innovation and Entrepreneurship Program

Certification Course Case Study – Selected Popular Certification Programs

Wealth Management Professional Certificate (100,000 students in 2020 - 2023)

Wealth Management
ITEM ASMA0452

LEARNING STYLE OPTIONS

CLASSROOM	VIRTUAL	ONLINE
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Self Paced Course Available Now Online \$229.00

Online 4 Hours English Professional

ENROLL NOW

This series covers diversification, tax issues, duration, risk tolerance, market timing, estate planning and dollar cost averaging - investment vehicles and concepts that lie at the heart of developing an investor profile and implementing successful wealth management strategies. It concludes with a case study integrating several issues common to wealth management that shows the banker/investment advisor how to apply these techniques to real-world situations.

This curriculum is made up of the following modules:

- Investor Profiling
- Portfolio Management and Duration
- Introduction to Portfolio Risk
- Asset Allocation and Taxation

CPE Credits: 4 - The complete list of CPE courses can be found here.

Program Details (NASBA) View



Portfolio Management Professional Certificate (100,000 students in 2020 – 2023)

COURSE INFO
NEW YORK INSTITUTE OF FINANCE
www.nyif.com

PORTFOLIO MANAGEMENT PROFESSIONAL CERTIFICATE
(5 Days)

This Professional Certificate comprises the following NYIF courses:

- Fixed Income Portfolio Management (Day 1)
- Equity Portfolio Management (Day 2)
- Hedge Funds (Day 3)
- Portfolio Management: Theory and Practice (Days 4 & 5)

Prerequisite knowledge:

- Financial Statement Analysis
- Basic Corporate Accounting
- Financial Accounting
- Financial Statement Analysis
- Financial Statement Analysis
- Financial Statement Analysis

MODULE 1: Review of Fixed Income Concepts

- Fixed income securities
- Fixed income instruments
- Fixed income valuation
- Fixed income risk
- Fixed income portfolio management

MODULE 2: Modern Portfolio Theory

- Modern Portfolio Theory
- Portfolio optimization
- Portfolio risk
- Portfolio return

Phone: (846) 3-2551
150 Broadway, 11th Floor, NY, NY 10038



Capital Markets Professional Certificate (50,000 students in 2020 - 2023)

COURSE INFO
NEW YORK INSTITUTE OF FINANCE
www.nyif.com

CAPITAL MARKETS PROFESSIONAL CERTIFICATE

This Professional Certificate comprises the following courses:

- Capital Markets: Global Market Structure, Products and Regulatory Trends (Day 1-2)
- Capital Markets: IPO, Mergers, Acquisitions and Strategic Days (Day 3-5)

Prerequisite knowledge:

- Basic Accounting

MODULE 1: Capital Markets and Key Participants

- Market structure
- Market participants
- Market products
- Market regulation

MODULE 2: Money Markets

- Money market instruments
- Money market participants
- Money market transactions
- Money market risk

MODULE 3: Time Value of Money

- Time value of money
- Present value
- Future value
- Yield to maturity
- Duration
- Convexity

MODULE 4: Equity Markets and Trading

- Equity market instruments
- Equity market participants
- Equity market transactions
- Equity market risk

Phone: (846) 3-2551
150 Broadway, 11th Floor, NY, NY 10038



Investment Banking Certification
Electronic Trading in Financial Markets
Trading - Fundamentals of Technical Analysis
Credit and Credit Risk Analysis Professional Certificate
Project Finance and the Public Private Partnership Professional Certificate

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NEW YORK INSTITUTE OF FINANCE
Where Wall Street Goes to School

Certification Course Case Study – Selected Popular Certification Programs (Cont' d)

Risk Management Professional Certificate (50,000 students in 2020 - 2023)

COURSE INFO
RISK MANAGEMENT PROFESSIONAL CERTIFICATE* (5 Days)
 NEW YORK INSTITUTE OF FINANCE
 www.nyif.com for more information

This Professional Certificate comprises the following courses:

- Introduction to Risk Management (1 Day)
- Risk Management: Theory and Practice (1 Day)
- Risk Management: Tools and Techniques (1 Day)
- Risk Management: Case Studies (1 Day)
- Risk Management: Final Project (1 Day)

Prerequisite knowledge:

- Basic math skills
- Basic probability and statistics

Unit	MODULE 1: Introduction	MODULE 2: Theory of Risk
1	<ul style="list-style-type: none"> Introduction to Risk Management Risk Management: Theory and Practice Risk Management: Tools and Techniques Risk Management: Case Studies Risk Management: Final Project 	<ul style="list-style-type: none"> Market Risk Credit Risk Operational Risk Legal Risk Reputation Risk Systemic Risk
2	<ul style="list-style-type: none"> Money and Capital Markets: Participants and Regulators Money and Capital Markets: Instruments and Instruments Money and Capital Markets: Instruments and Instruments Money and Capital Markets: Instruments and Instruments 	<ul style="list-style-type: none"> Concepts in Risk Management Risk Management: Theory and Practice Risk Management: Tools and Techniques Risk Management: Case Studies Risk Management: Final Project
3	<ul style="list-style-type: none"> Risk by Asset Class Equity: Mergers and Acquisitions, Restructuring, Bankruptcy, and Liquidation Fixed Income: Duration, Convexity, and Credit Commodities: Futures, Options, Swaps, and Credit Foreign Exchange: Forward, Swap, and Credit Commodities: Spot and Forward 	<ul style="list-style-type: none"> Practical Risk Management Risk Management: Theory and Practice Risk Management: Tools and Techniques Risk Management: Case Studies Risk Management: Final Project
4	<ul style="list-style-type: none"> Risk Management: Tools and Techniques Risk Management: Case Studies Risk Management: Final Project 	<ul style="list-style-type: none"> Asset Liability Management Asset Liability Management Asset Liability Management Asset Liability Management

Phone: 1 (847) 362-2551
 100 Broadway Floor 10, New York, NY 10038

Mergers & Acquisitions Professional Certificate (30,000 students in 2020 - 2023)

COURSE INFO
M&A PROFESSIONAL CERTIFICATE* (5 Days)
 NEW YORK INSTITUTE OF FINANCE
 www.nyif.com for more information

This Professional Certificate comprises the following courses:

- Introduction to Mergers and Acquisitions (1 Day)
- Mergers and Acquisitions: Theory and Practice (1 Day)
- Mergers and Acquisitions: Tools and Techniques (1 Day)
- Mergers and Acquisitions: Case Studies (1 Day)
- Mergers and Acquisitions: Final Project (1 Day)

Prerequisite knowledge:

- Basic math skills
- Principles of corporate finance and valuation
- Familiarity with financial markets and instruments

Unit	MODULE 1: Mergers and Acquisitions - Concepts and Theories Part I	MODULE 2: Mergers and Acquisitions - Concepts and Theories Part II
1	<ul style="list-style-type: none"> Mergers and Acquisitions: Theory and Practice Mergers and Acquisitions: Tools and Techniques Mergers and Acquisitions: Case Studies Mergers and Acquisitions: Final Project 	<ul style="list-style-type: none"> Concepts in Mergers and Acquisitions Mergers and Acquisitions: Theory and Practice Mergers and Acquisitions: Tools and Techniques Mergers and Acquisitions: Case Studies Mergers and Acquisitions: Final Project
2	<ul style="list-style-type: none"> Mergers and Acquisitions: Theory and Practice Mergers and Acquisitions: Tools and Techniques Mergers and Acquisitions: Case Studies Mergers and Acquisitions: Final Project 	<ul style="list-style-type: none"> Structuring the Deal Legal and Financial Aspects of Mergers and Acquisitions Valuation and Deal Structuring Deal Structuring and Execution Deal Structuring and Execution
3	<ul style="list-style-type: none"> Deal Structuring and Execution Deal Structuring and Execution Deal Structuring and Execution Deal Structuring and Execution 	<ul style="list-style-type: none"> Deal Structuring and Execution Deal Structuring and Execution Deal Structuring and Execution Deal Structuring and Execution
4	<ul style="list-style-type: none"> Deal Structuring and Execution Deal Structuring and Execution Deal Structuring and Execution Deal Structuring and Execution 	<ul style="list-style-type: none"> Deal Structuring and Execution Deal Structuring and Execution Deal Structuring and Execution Deal Structuring and Execution
5	<ul style="list-style-type: none"> Deal Structuring and Execution Deal Structuring and Execution Deal Structuring and Execution Deal Structuring and Execution 	<ul style="list-style-type: none"> Deal Structuring and Execution Deal Structuring and Execution Deal Structuring and Execution Deal Structuring and Execution
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 100 Broadway Floor 10, New York, NY 10038

Machine Learning for Trading Google collaborates with NYIF (15,000 students in 2020 - 2023)

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Advanced Equity Valuation Techniques
Trading - Quantitative Technical Analysis
Professional Certificate in Asset Management
Mortgage Backed Securities Professional Certificate

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 Where Wall Street Goes to School



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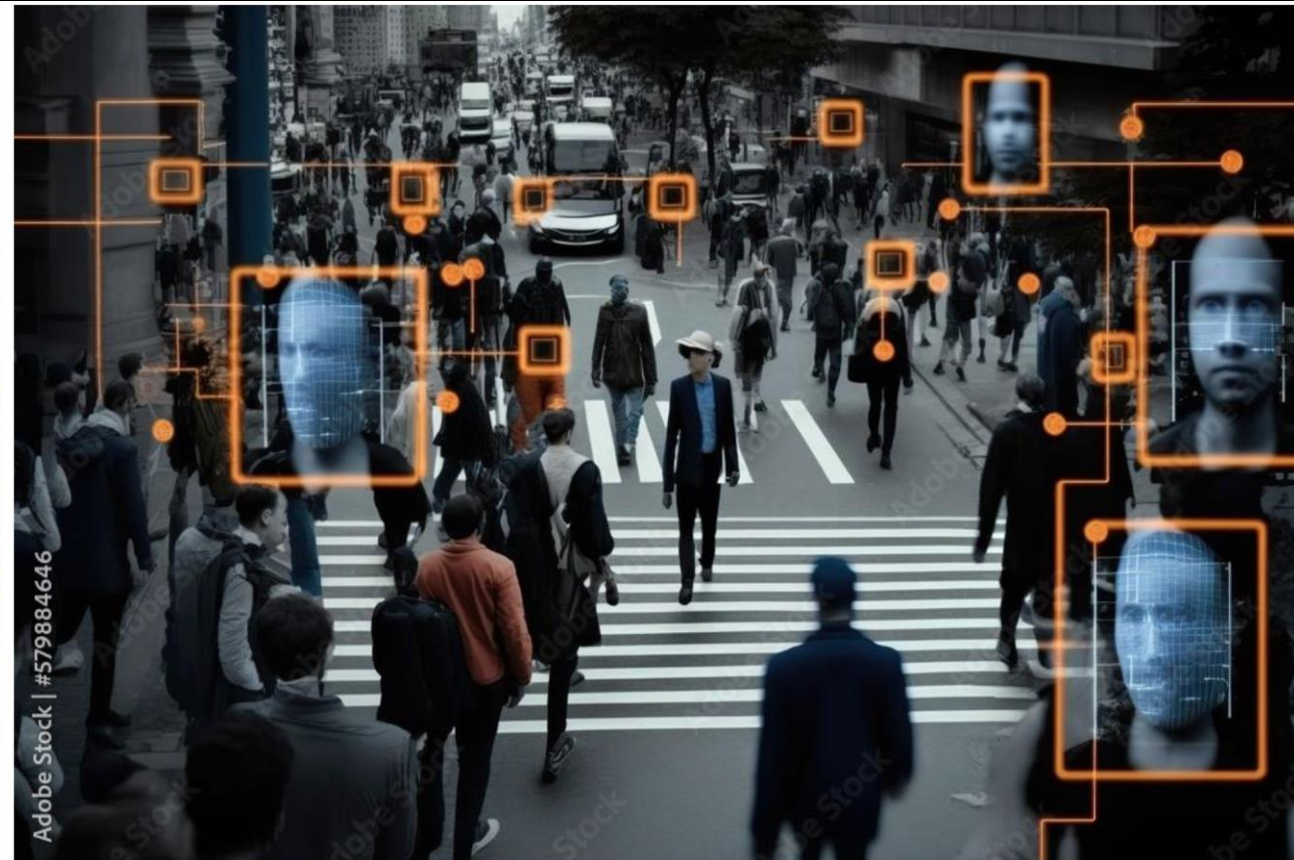


Embrace AI: Challenges and Opportunities



AI Dilemma #1

The Governance, Privacy Issue



Adobe Stock | #579884646

AI Dilemma #2

KEY BENEFITS OF SELF-DRIVING



Safety

54%



Reduced costs

9%



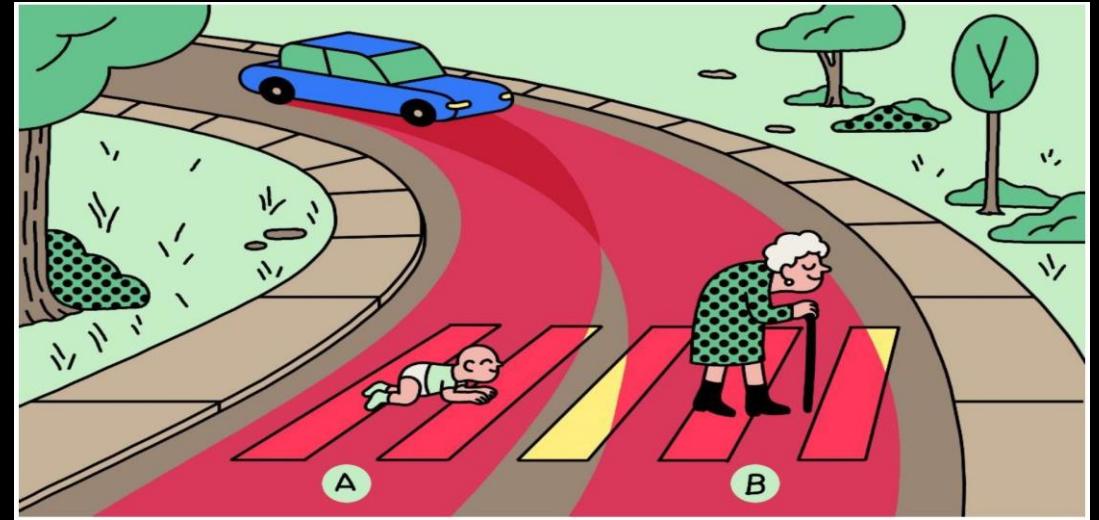
Easier parking

9%



More free time

9%



Source: GfK's connected cart study 5,800 consumers 18+ (Brazil, China, Germany, Russia, UK, USA). November 2014
© GfK 2015

The moral machine..
trolley problem



AI Dilemma #3

Misinformation and Ethics Issues



ORIGINAL

DEEPPFAKE

AI Dilemma #4

Humanity? Peace vs. War?

AR-1
Assault Rotor Weaponized Drone

DronesVision

AR-1 designed for mounting light weapons such as sub machine guns and assault rifles. Highly shock-proof, high strength, high endurance, etc.
In the frontline of warzone or special police attack, when the enemy and friendly are in a stalemate, they can carry out multi-angle attacks and disturbances in the air to gain the advantage of attacking or moving forward.



25 Mins

10 Km+

Unique Transmission Band

Made in Taiwan

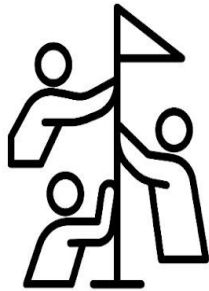


How We React?

Think, Engage/Collaborate and ACT

Sustainable AI for Humanity Movement

Thought
Leadership



Think

Ecosystem
Engagement



Engage

Advocacy
Initiatives



Act

Sustainable AI for Humanity

Governing AI for
Humanity

Sustainability
of AI

AI for
Sustainability

'AI Godfather'

Yoshua Bengio:

We need a
humanity defense
organization



Yoshua Bengio, founder and scientific director of Mila at the Quebec AI Institute, during a Senate Judiciary Subcommittee on Privacy, Technology and the Law hearing in July. The hearing was titled "Oversight of A.I.: Principles for Regulation." Photo credit: Valerie Plesch/Bloomberg via Getty Images

UN Security Council meets for first time on AI risks

REUTERS® World Business Markets Sustainability Legal More

Disrupted

UN Security Council meets for first time on AI risks

By Michelle Nichols

July 19, 2023 5:12 AM GMT+8 · Updated a month ago

🔖 Aa 🔄

UN Secretary General embraces calls for a new UN agency on AI in the face of 'potentially catastrophic and existential risks'

By Steve Fung, CNN
Updated 12:00 PM EDT, Tue July 25, 2023

📘 🐦 📧 🔄



Getty Images

FUTURE OF A.I. NEWSROOM

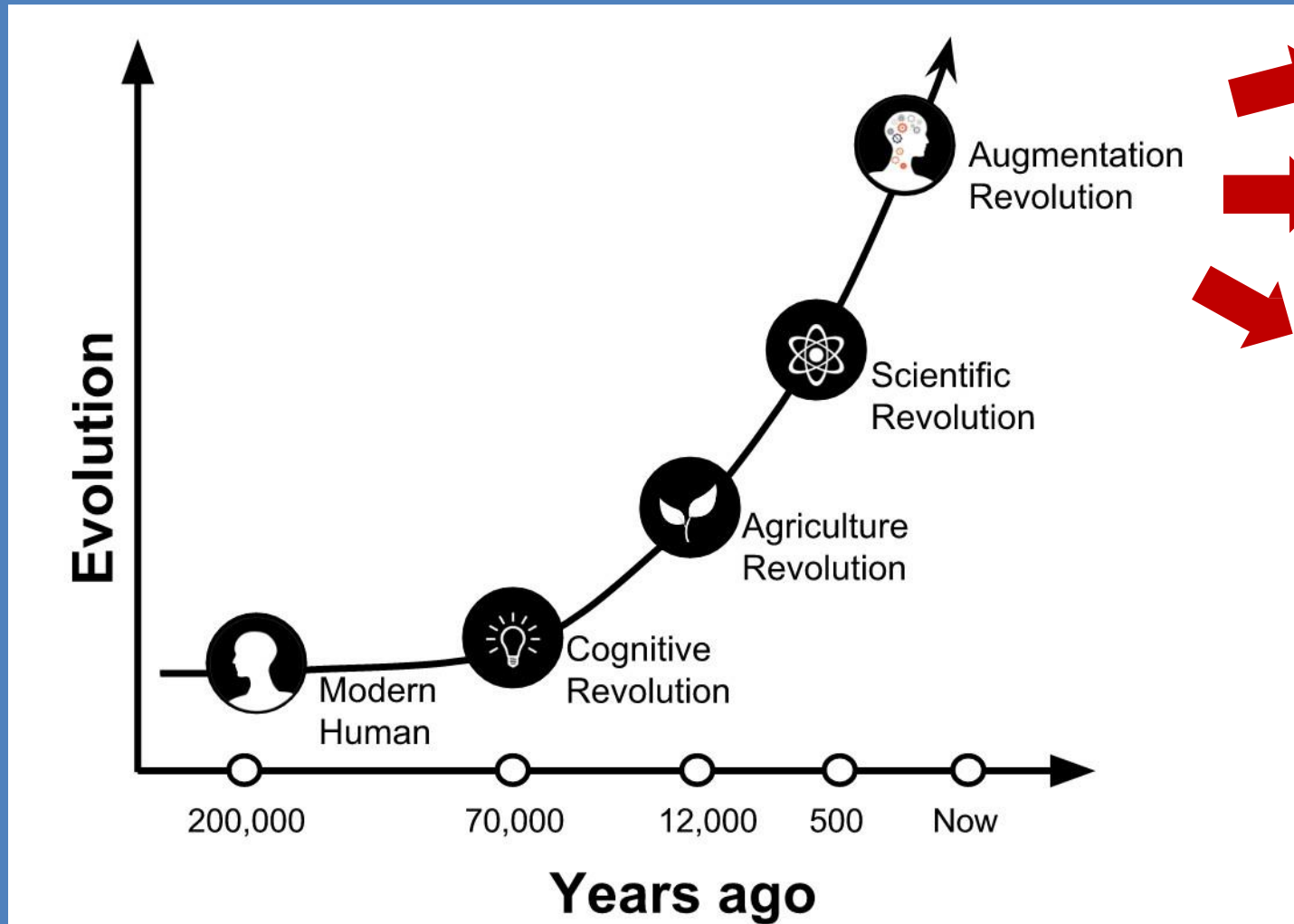
U.N. TO HOLD FIRST TALKS ON ARTIFICIAL INTELLIGENCE **CNN**

U.N. holds first talks on artificial intelligence

Video Ad Feedback



History of Human Evolution

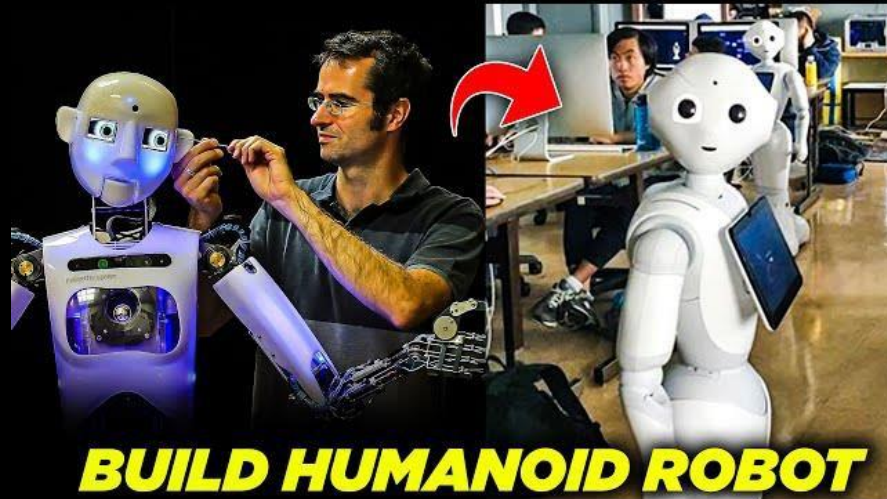


Intelligence Revolution

Information Revolution

Industrial Revolution

From Building AI to Apply AI for Good Cause

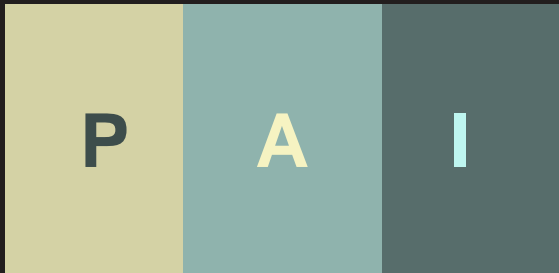


IV: Prosperity for All Initiative – A GLOBAL INITIATIVE:

– Provide world-class financial education by leveraging on AI



Global Partners
NGOs, Enterprises,
Government Agencies,
Universities, Schools,



Prosperity for All Initiative



Advancing Diversity, Equity, and Inclusion with Financial Education

a non-profit initiative

IV. PAI Structure and Role for Student Volunteers

1. **Lectures** by top **political leaders, famous faculties from academia, famed financial experts, business executives or even celebrities** on basic skills and knowledge of finance, business, consumption, investment and entrepreneurship topics, to help young people develop financial and business literacy.
2. Invite **talented students and young professionals as volunteers** and teaching assistants to support session experts in hosting lectures and discussions, guide students to complete related homework.
3. **Online platform** with high-quality educational resources and features - to enable professionals to regularly lecture, counsel, and share growth experiences for middle- and lower-income groups.
4. In collaboration **with schools, colleges, universities and cultural centers** in communities, as well as various **public welfare organizations**.



GLOBAL Prosperity for all initiatives (PAI)

Inclusive and Equitable Financial Education/

A Non-Profit education program to improve employability and financial independence among global youth of all backgrounds

Countries covered: India, China, United States, Brazil, Nigeria, Chile, Indonesia, Canada, Mexico, Afghanistan, Pakistan, Netherlands, Ireland, Rwanda, Spain, Malaysia, Zimbabwe, Egypt, Ukraine, etc.



PAI since launch : Pilot 2020 by NYIF

Launch in 2020

- ▶ The PAI was formally launched on 26th December 2020, with the first session on the high-level overview of Macro and Microeconomics fundamentals.
- ▶ Delivered by senior NYIF faculty and Northwestern University alum, Mr. Jimmy Pang this first session attracted nearly 160 registered participants from 15 countries worldwide.

Since then, PAI has successfully

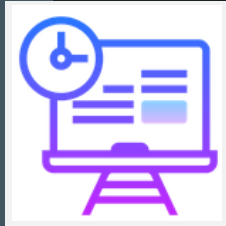
- ▶ engaged leading schools as PAI partners
- ▶ attracted 360 students participated in live sessions and 950 students registered to watch playback;
- ▶ organised eight more sessions, related to three categories of:
 - a) developing basic financial skills
 - b) understanding the financial industry and how to benefit from it
 - c) starting your own business

Global Participation

Afghanistan, Albania, Algeria, Argentina, Australia, Brazil, Canada, China, Colombia, Denmark, Egypt, El Salvador, France, Gambia, Germany, Greece, Honduras, India, Indonesia, Italy, Jamaica, Kenya, Lebanon, Luxembourg, Malaysia, Mexico, Mozambique, Netherlands, Nigeria, Pakistan, Panama, Peru, Philippines, Rwanda, Singapore, South Africa, Saudi Arabia, Spain, Trinidad and Tobago, Ukraine, United Arab Emirates (UAE), United Kingdom (UK), United States of America (USA), and Zimbabwe

Track 1 : Developing basic Financial Skills

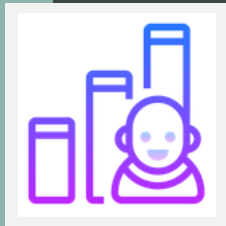
Developing
Financial know-how
and
Intelligence



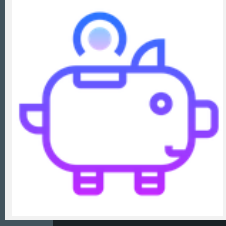
Protecting
Your finances
and
Avoiding frauds



Nurturing
Career Pathways
and
Learning for income



Financial Planning
and
Savings



Track 2 : Understanding the **Financial Industry** and **Careers**

**Improving Credit
and
Managing Debt**



**Understanding the
Role and benefits of
Capital Markets**



**Avoiding
Financial Risks
and
Using Insurance**

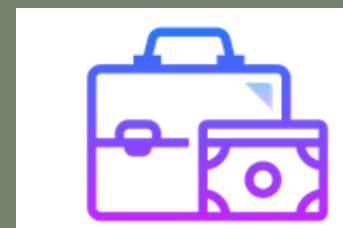


Track 3 : Starting Your Own Business

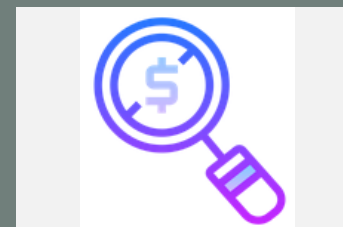


Financial education and skills for less-developed areas and low-income families

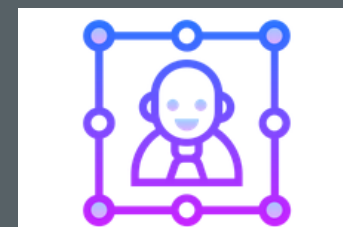
Helping them master basic financial knowledge and business judgment for personal growth and improving employability



**Business Start-ups
and
Company Formation**



**Understanding
Finances of
a Company**



**Key elements of
Ethics and Responsible Behaviour in
Professional Life**

What We leveraged AI to Enhance our Course Materials

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What is Financial Management?

Example



The slide features a man with a beard and short hair, wearing a blue polo shirt, standing and speaking with his hands open. To his left is a close-up image of a burrito filled with chicken, tomatoes, and lettuce. The background is white, and the New York Institute of Finance logo is in the top right corner.

How the AI Techniques Evolve To Create More Appealing Content





Track 4 and More: Sustainable Businesses and Green Economic Transition



**Climate Crises,
Decarbonization,
and
Green Economy**

**Global Biodiversity
and
Natural Capital**

**Water Management,
Oceans
and
Blue Economy**

**Global Energy
Transition:
Renewable Energy
& Energy Efficiency**

**Rise of new
Transportation :
Electric Vehicles,
Shared Mobility, and
Self Driving**

**Global Sustainable
Development Agenda
and Sustainable
Development Goals
(SDGs)**

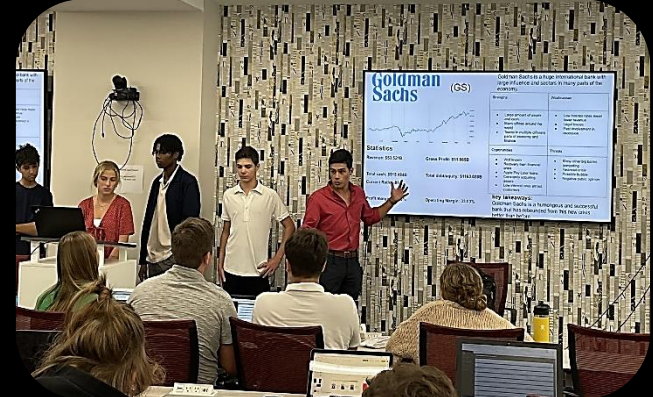
**Key Social Issues
of
Global Importance**

**Social
Entrepreneurship**

**Future of Food and
Agriculture**

**Smart and
Sustainable Cities**

In-Person Bootcamps in Major Cities around the World



Annual Wall Street Summit: Regional and Global Competition



We Seek Collaboration – Programs and Content Development; AI Tools; Instructors, Local Governments, NGOs, Enterprises, and Schools.....



Online & Offline Curriculum and Technology



- Work with AI Tech Companies to develop more AI enhanced contents
- Online and offline lectures
- Exclusive learning platform
 - Homework & Quizzes
 - Free learning experience
 - Exam fee will be collected



Influential People, Local Leaders Certification & Volunteering



- Invite leaders, celebrities and influencers to be part of our Faculties, Students completing courses and passing exams will be awarded certifications. Students will:
 - ✓ Gain Free access to competition
 - ✓ Receive a scholarship for NYIF advanced programs
 - ✓ Bing selected for global volunteer program
 - ✓ Parents will gain free access to NYIF courses



Boot-Camps Enprises, NGOs, Gov.



- AAI and NYIF will organize unique boot camp in regional top cities as well as global financial center
- Seek Government, NGO and Enterprises Sponsorship
- NYIF will also invite certification holders to participate regional & global finance & Investment competition



Universities and Schools Teachers & Parents Training



- Offer training programs in partnership with Universities and local Schools for teachers
- Parents of NYIF Certification holders will also be offered free access to NYIF free training programs.
- In partnership with Local Stock Exchanges as a tool for investor education

Thank you





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