

PBC SCHOOL OF FINANCE
RESEARCH CENTER FOR
CHINA INSURANCE AND PENSION FINANCE

清华大学五道口金融学院
中国保险与养老金融
研究中心

ABOUT US

Tsinghua PBC School of Finance

- Tsinghua University's 17th school
- Founded on March 29, 2012 as a joint venture between Tsinghua and the People's Bank of China (PBC).

Mission:

- Promoting excellence in the finance industry and financial regulation through top-notch education and cutting-edge research.

Target:

- A world-class platform for financial education and finance and policy research.

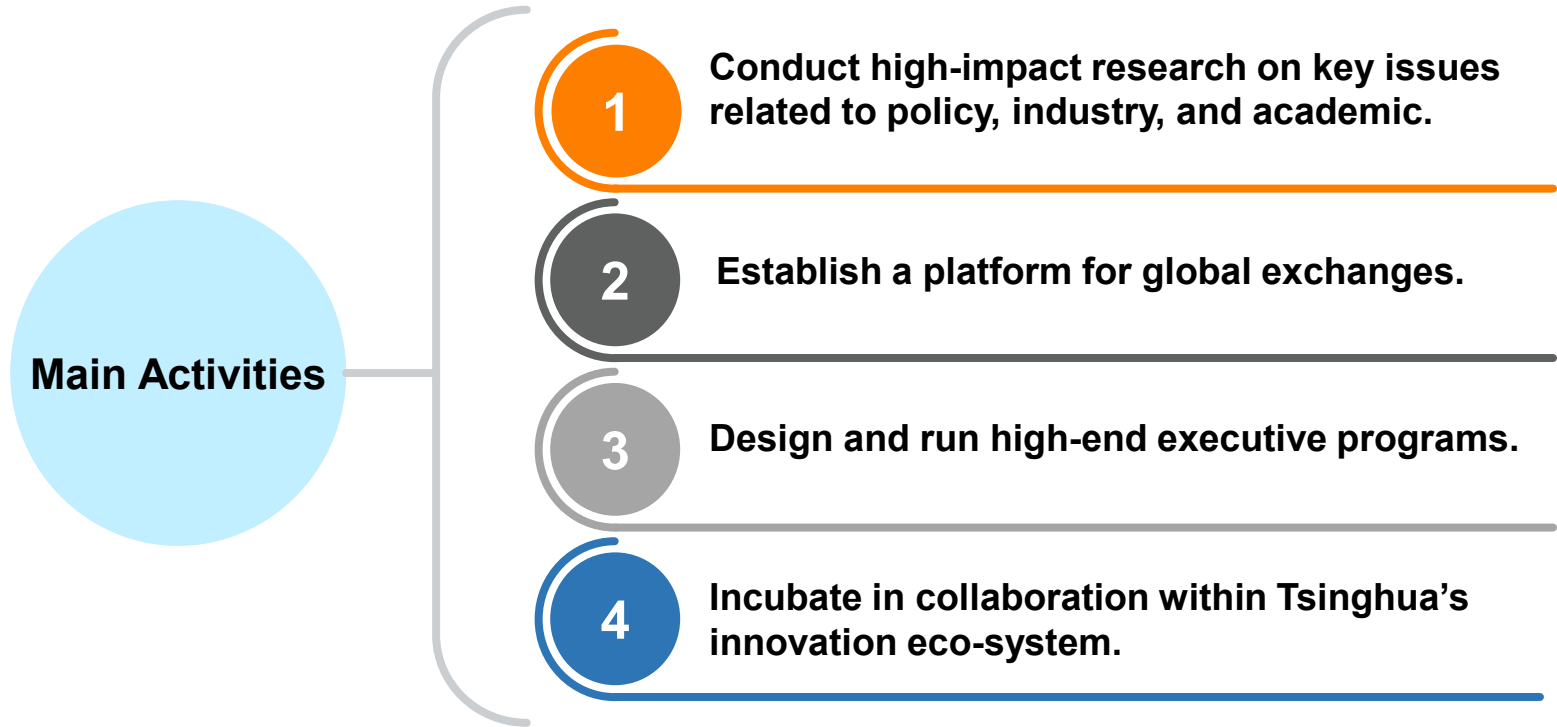
Research Center for China Insurance and Pension Finance

- Founded on Nov, 2016 · under THUNIFR
- An initiative under the guidance of the former China Insurance Regulatory Commission (CIRC).
- Supported by the Insurance Asset Management Association of China (IAMAC) and other institutions.

Missions

- A research platform involving global experts in insurance, pension finance, and related innovation.
- A talent-cultivating platform offering high-end executive programs with nation-wide influence.
- An incubator connecting entrepreneurs, investors, regulators and academics.

ABOUT US



Research Projects

Policy-shaping



- Other research reports submitted to the National Financial Supervisory Administration
- Internal policy memo/proposals submitted to the Chinese People's Political Consultative Conference (CPPCC).

Industry



Global Insurtech Series



Industrial Level Communication Platform

Tsinghua PBCSF Global Finance Forum

Tsinghua
WUDAOKOU
Insurtech Forum

Tsinghua PBCSF
Pension Finance
Forum 50

Close-Door
Seminars

New thinking, New trends, New practices, New dynamics of
China's financial reforms

- One of the most famous financial forum in China.
- Hosted by Tsinghua, organized jointly by PBCSF, National Institute of Financial Research (NIFR), and Institute for Fintech Research (THUIFR).

- Organize the **Insurance Sub-forum**.

- A forum among insurance industry regulators, enterprises, and investment institutions.

- **2017** Innovation and Development in the Insurance Industry Forum
- **2019** Insurance Night: The Global Wave of InsurTech
- **2021** New Insurance and Pension Business Models in the Era of Global Technology-Driven Change
- **2023** The Impact of Population Aging on the Economy and Finance“
- **2024** Building a Diverse Pension Finance System
- **2025** Ageing:Economic Impact and Coping Strategies



Industrial Level Communication Platform

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Close-Door
Seminars

- The first batch of members consists of **14 Chinese top-level InsurTech companies**.
- To promote entrepreneurship in insurance technology.
- To build a thriving new ecosystem focusing on insurtech.

Members :

InsurTech entrepreneurs, insurance companies, investors, and other parties interested in and supportive of the development of insurance technology.



Forum's Inaugural Conference



Quarterly Salon



Forum's Inaugural Conference



Themed Close-door Meeting

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Finance Forum 50

Close-Door
Seminars

- Its predecessor was the CAFF50, the most influential ageing finance forum in China.
- The authoritative work '*China Pension Finance Development Report*' series is published annually on the forum.
- **Position:** as a high-level and international think tank in the field of pension finance, dedicated to promoting the development of China's pension finance from multiple aspects such as research, policy, and practice.



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**Close-Door
Seminars**



Themes

- **Policy-Shaping**
 - Health Insurance under New Circumstances: New Policy Interpretation Seminar
 - Financial and Policy Support Systems for Technological Innovation
 - Institutional Design for China's Modern Pension System
- **Health Insurance and Greater Health**
 - Innovation in 'Healthcare + Insurance' Model
 - Redefining Health Insurance: The Rising InsurTech Unicorn Clover Health
 - Frontiers of Medical Technology and Insurance Innovation
- **Insurtech:**
 - Blockchain, ChatGPT and Insurance, Cyber Security.....
- **Customized Seminar with Local government**
 - Ningbo, Shenzhen, Foshan

High-end Executive Education Programs

第七届
清华大学金融普及教育训练营
THE 4th
TSINGHUA UNIVERSITY FINANCIAL
EDUCATION TRAINING PROGRAM

创新保险中介渠道变革与发展
INNOVATE THE TRANSFORMATION AND DEVELOPMENT
OF INSURANCE INTERMEDIARY CHANNELS
2023年8月25日-8月26日
清华大学五道口金融学院深圳校区
深圳市福田区永东一路大融A座一楼
面向对象：创新型互联网保险中介

邀请函

中国经济全面进入“新常态”，数字化变革、消费新常态以及监管新趋势之下保险中介渠道正处于创新与发展的快车道上。互联网保险中介平台、移动应用程序和人工智能技术的应用为消费者提供了更加便捷、高效的保险服务体验。鉴此，清华五道口金融学院集结了新型保险中介渠道，组织以“2023 创新保险中介渠道变革与发展”为主题的训练营。通过提供高质量的交流平台，博观而约取，厚积而薄发，期待与您共同探究保险销售的转型之路。

主要议程

| 日期 | 时间 | 课程内容 |
|-------|-------------|--|
| 8月25日 | 9:00-9:30 | 开幕仪式 魏福阳 清华大学金融科技研究院副院长 清华大学中国保险与养老金研究中心主任 徐瀚 乐橙云服CEO |
| | 9:30-11:30 | 专业中介与寿险公司的共生战略 某寿险公司董事长 |
| | 14:00-17:00 | 中国家庭风险保障体系分析 朱俊生 清华五道口中国保险与养老金研究中心 |
| 8月26日 | 9:00-11:45 | 互联网保险相关法律解析 银保监会中介部 |
| | 14:00-17:00 | 创业者的资本市场机会 财务顾问公司 |
| | 17:00 | 颁发证书及闭幕仪式 |

主办单位：清华大学 | 金融科技研究院
支持单位：东熊云服
承办单位：北京金融科技研究院 | 北京清华金融研究院

Customized Financial Literacy
Education Training Camp

Customized Executive Training
Program of Listed Insurance
Companies

Resources

- Top Domestic and International Experts
- Domestic and Europe-America Study Tour Programs
- Visits to Overseas Companies
- Multiple Domestic and International Teaching Locations: New York; Shenzhen, Shanghai, Zhuhai, Nanjing

课程模块

全球保险业发展与变革

养老服务与健康管理

医疗、医药与医保

资产管理行业发展与变革

金融机构数字化转型

智慧交通、智慧城市的未来

碳达峰、碳中和及影响

Platform for Exchanges: Official Wechat Account

- - In 2017, the center began to operate the official Wechat Media Platform:
“PBCSF Insurance Observation”
- - till 2025, a total of 1012 articles were published, including 470 original articles.

Number of followers

20793

Number of original articles

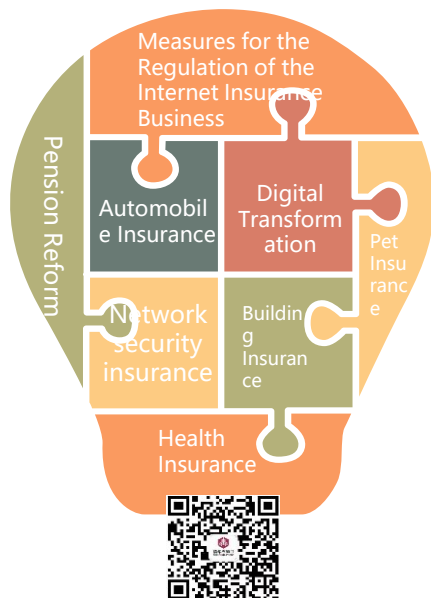
470

Number of total reads

1,000,000+

129 articles were published in 2023

Forwarded by the school's official account, Sina Finance, Sohu and other media for many times



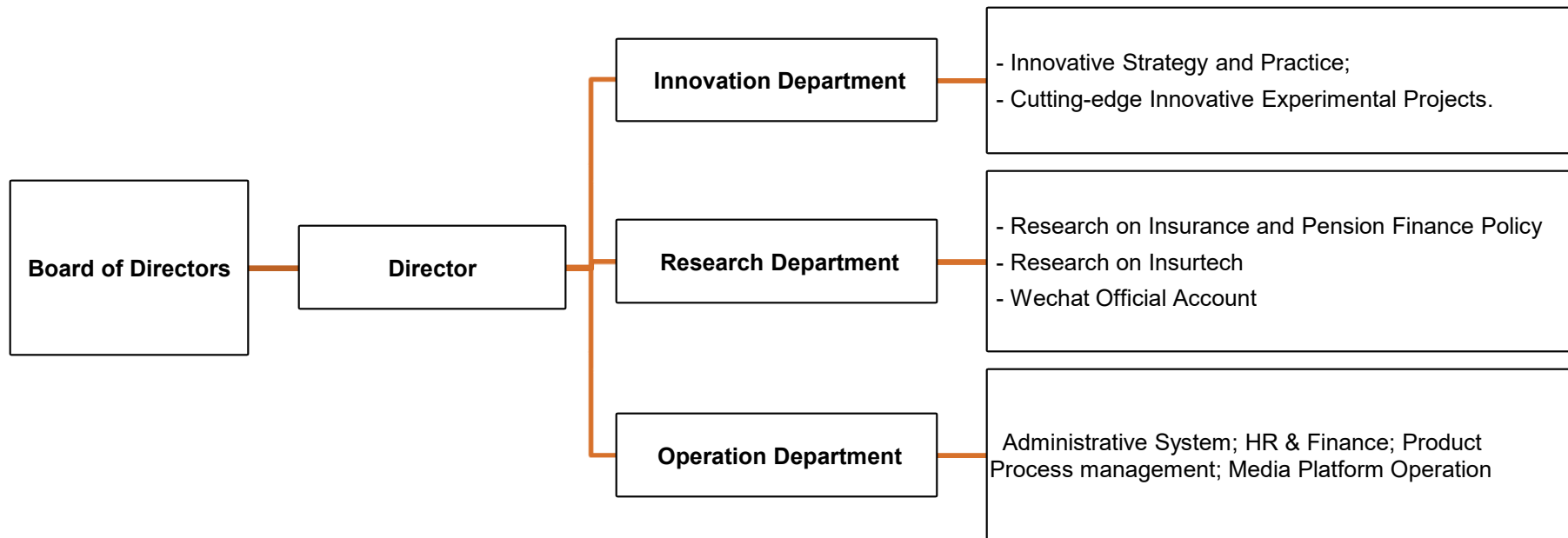
➤ **The content of the official account includes:**

- Original insurance industry analysis articles;
- Academic achievement display;
- Industry news summary;
- Department related news and Event announcements.

➤ **Topics cover a wide range, involving frontier issues in insurance industry and pension finance field, etc.**

Structure

- Follow the leadership of the board of directors.



Core Competence - Connecting, Impact, Insights and Education

1

Connecting: Regulators, Local Governments and Industry Leaders

2

Impact: High-impact Meetings and Exchanges

3

Insights: Research Projects

4

Education: Customized Training Program for Members



Thanks!