



Co-hosted with Fidelity International

AI and the future of financial services: Unlocking value while preserving trust

The session will explore how AI is reshaping the financial services value chain, focusing on key touchpoints across the client lifecycle - from fund selection and content to client relationship management, while emphasising the importance of maintaining trust. It will examine how AI supports investment decisions alongside human judgement, enhancing insight and consistency rather than replacing accountability.

The discussion will also address adoption trends, including the growing role of women in wealth management and the relatively low uptake of AI. Ultimately, the session will highlight how effective AI use hinges on disciplined application, governance, and its ability to deliver consistent and reliable outcomes.

Speaker



Mr. David MUNDY
Fidelity International

Moderator



Mr. Vincent CHOW
HKRSA

Event details

Date & Time: **Wednesday, 8 July 2026 | 3:00 – 4:00 pm**

Language & Fee: English | Free

Register: [Register here](#) or by scanning QR code
Webcast details will be emailed to participants approximately 24 hours prior to the event



Notes

- **CPD/CPT:** Employees of our corporate members may claim 1 hour (**non-core**) training time for CPD/CPT, subject to relevant body's approval.
- **Non-Members:** An attendance letter will be issued to non-members who attend the entire webinar and pay HKD 350 after the session.
- **Corporate Members:** Please check the Corporate Member List on our website. Your company name must match exactly; otherwise, you will be treated as a non-member.
- **Individual Members:** Applies only to those already approved by HKRSA ExCom.
- **Login:** Use the same name and email as your HKRSA registration.
- **Virtual Platform:** Hosted on Fidelity International. Registration implies consent for HKRSA to share basic details including name, title, organisation and email address to Fidelity International for platform access.
- **Enquiries:** please contact us either at events@hkrsa.org.hk or (852) 2147 0090.

Event programme

3:00 – 3:10	Opening remarks Mr. Vincent CHOW Executive Committee Member HKRSA
3:10 – 3:40	Keynote Speech Mr. David MUNDY APAC Head of Delivery Fidelity International
3:40 – 3:55	Q&A Session with Mr. David MUNDY Moderator Mr. Vincent CHOW
3:55 – 4:00	Closing remarks Mr. Vincent CHOW

Moderator



Mr. Vincent CHOW
Executive Committee Member
HKRSA

Vincent Chow has worked in the Treasury Department of HK Electric for more than 25 years. As Group Treasurer, a position he assumed in September 2008, he is responsible for the treasury activities of both HK Electric and Power Assets including capital raising, financial risk management and banking relationship. Upon the spin-off of HK Electric from Power Assets in 2014, he has also taken up the investor relations function jointly with the CFO.

Apart from the treasury function, Vincent is also responsible for managing the retirement schemes of both HK Electric and Power Assets.

Vincent holds an MBA from the University of Hong Kong and is a CFA charterholder.

Speaker



Mr. David MUNDY
APAC Head of Delivery
Fidelity International

David Mundy is a senior transformation and strategy executive in asset and wealth management, with more than 25 years of industry experience across Melbourne, London, and Hong Kong. He is currently APAC Head of Delivery - Regulatory & APAC at Fidelity International, where he has spent the past seven years supporting APAC business strategy, global sustainability strategy, and most recently serving as the region's AI lead. Before joining Fidelity International, David spent 14 years at J.P. Morgan, most recently as APAC COO for Asset Management Distribution.

He is also an experienced board director and serves as Co-Chair of the Sustainability Committee for the Australian Chamber of Commerce in Hong Kong. David holds an LLB from the University of London, a CFA Certificate in Sustainable Investing, the CISL Business Sustainability Management Certificate, and a Master's in Sustainability from the University of Cambridge.

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The Hong Kong Retirement Schemes Association (HKRSA) was established in 1996 to promote the interests and best practices of retirement schemes in Hong Kong including provident and pooled retirement funds. The HKRSA is a not-for-profit, non-political association, which represents retirement schemes and their members, providing a forum for discussion of issues of current and topical interest.



Retirement planning should go beyond just finances to make everyday more fulfilling.

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