



Co-hosted with Franklin Templeton

How AI Will Shape the Financial Industry – Opportunities and Challenges

Artificial Intelligence (AI) is rapidly reshaping the financial industry, transforming how institutions operate, serve clients and create long-term value. Join **William Chang, CFA, Senior Client Portfolio Manager, Franklin Equity**, as he explores how AI is being applied across the financial services sector and the opportunities it presents. Drawing on practical examples, William will discuss how AI is driving productivity gains and operational efficiencies, while addressing key challenges institutions must navigate. He will also share his perspectives on how AI is evolving and what financial professionals should expect as the technology continues to shape the future of the industry.

Moderator



Ms. Ruby FUNG
Franklin Templeton

Keynote Speaker



Mr William CHANG, CFA
Franklin Templeton

Closing Remarks



Mr. Alfred LEE
HKRSA

Event details

Date & Time: **Monday, 3 August 2026 | 2:30pm – 3:30pm**

Language & Fee: English | Free

Register: [Register here](#) or by scanning QR code
Participants will receive a confirmation email with the webinar link ONE DAY before the event.



Notes

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- **Enquiries:** please contact us either at events@hkrso.org.hk or (852) 2147 0090.

Event Programme

2:30 – 2:40

Opening Remarks

Ms. Ruby FUNG

Senior Director, Institutional Business, Greater China
Franklin Templeton

2:40 – 3:10

Keynote Speaker

Mr. William CHANG, CFA

Senior Client Portfolio Manager
Franklin Equity

3:10 – 3:25

Q&A

Mr. William CHANG, CFA

Moderator

Ms. Ruby FUNG

3:25 – 3:30

Closing Remarks

Mr. Alfred LEE

Vice Chairman of Executive Committee
Member of Business Strategy Sub-committee
HKRSA

Keynote Speaker



Mr. William CHANG, CFA

Senior Client Portfolio Manager
Franklin Equity

William Chang is a senior client portfolio manager for Franklin Equity, responsible for representing the team's investment strategies within APAC. In this role William is responsible for business development initiatives in the region, working closely between the investment teams of Franklin Equity as well as clients and prospects.

William has over 20 years experience in the asset management industry, having previously served as an institutional portfolio manager for the Templeton Global Equity Group in a similar capacity and scope, as well as focusing on the creation of original research and thought leadership related to global equity investing.

Prior to joining Franklin Templeton in 2021 Mr. Chang was a vice president with the client solutions team with Goldman Sachs Asset Management in New York. He was responsible for origination efforts, as well as developing content and portfolio solutions for corporate/public pensions, sovereign wealth funds and endowments.

Mr. Chang holds a Bachelor of Science in Operations Research and Industrial Engineering from Cornell University. He is also a Chartered Financial Analyst (CFA) charterholder.

Moderator & Opening Remarks



Ms. Ruby FUNG

Senior Director, Institutional Business, Greater China
Franklin Templeton

Ruby Fung is the Senior Director for Greater China Institutional Business for Franklin Templeton. Based in Hong Kong, Ms. Fung is responsible for the distribution of institutional products, business development and fundraising in Greater China. Ms. Fung covers different types of investors, including public institutions, pension, insurance companies and family offices, etc.

Ms. Fung has almost 20 years of sales and business development experiences in the asset management industry. Before joining Franklin Templeton, Ms. Fung had several institutional sales and relationship management positions at leading global asset managers including State Street Global Advisors, BNY Mellon Asset Management and Barings Asset Management.

Ms. Fung received a Master of Finance at University of Hong Kong and Bachelor of Business and Economics at University of Manchester, United Kingdom.

Closing Remarks



Mr. Alfred LEE

Vice Chairman of Executive Committee
Member of Business Strategy Sub-committee
HKRSA

Alfred Lee is the Managing Director and Head of Institutional Business, North Asia ex-China of Amundi Hong Kong, he responsible for the Institutional Business development in Korea, Taiwan, Hong Kong across all the investment strategies.

Alfred graduated from the University of Hong Kong, with honors, in Economics and Finance. Alfred is also a Chartered Financial Risk Manager.

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