



Course on

Financial Health and ESG

April 15th | 12pm - 4:00 pm EST

Register today:

www.fintechcadence.com/certificate/



Abhishek Bhasin
Head of Product at Uplinq




Molly Willats

Head of Financial Health Strategy and
Ontario Lead at Fintech Cadence



Lars Boggild

Impact Investment Manager at Vancity



Agenda of the Day

Agenda | April 29th

- Admin Items
- Meet your Peers | Breakout rooms: Financial Health discussion
- Guest lecturers presentation
 - **Financial Health with Molly Willats** - Head of Financial Health Strategy and Ontario Lead at Fintech Cadence
 - **Introduction to ESG with Lars Boggild** - Impact Investment Manager at Vancity
- Fireside Guest Speaker
 - **Abhishek Bhasin** - Head of Product at Uplinq
- Certificate wrap up by **Layial El-Hadi, Executive Director at Fintech Cadence**

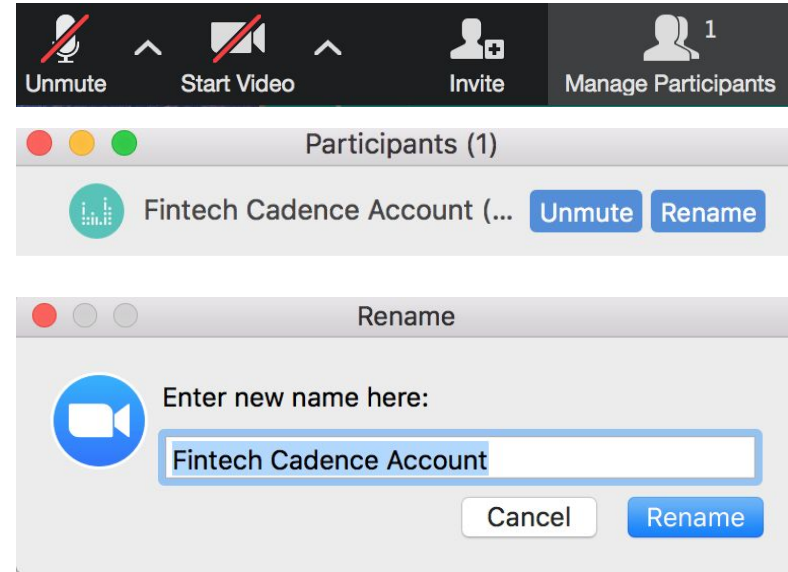
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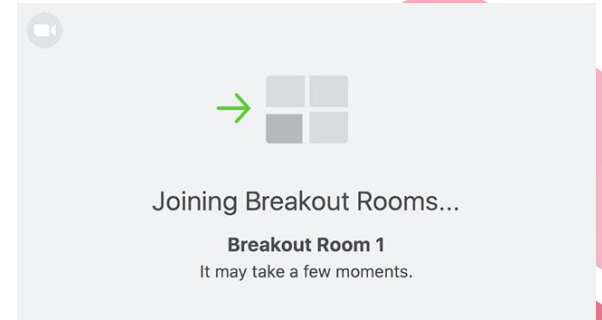
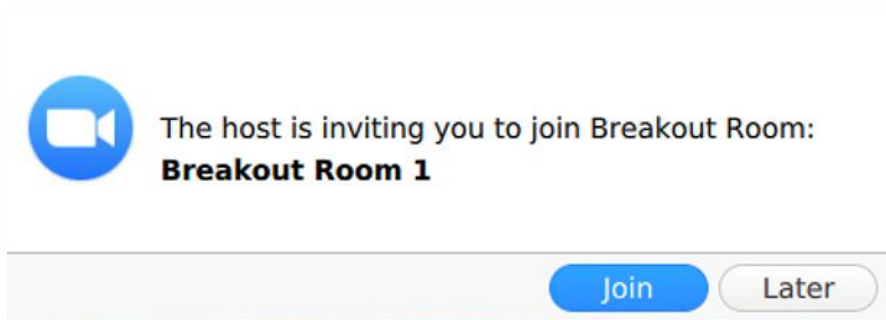
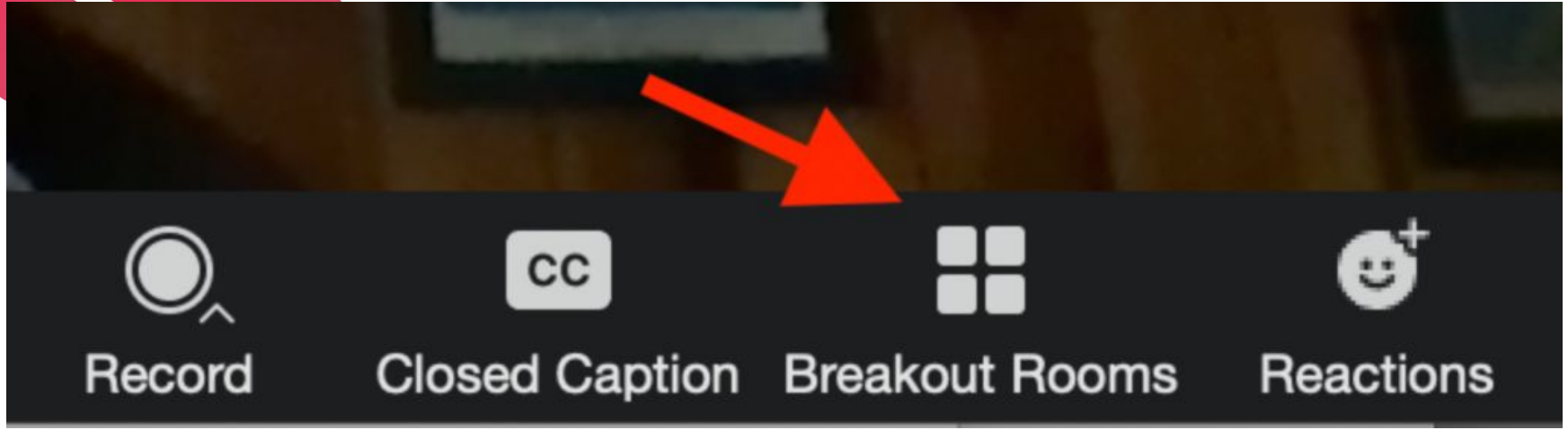
Admin Items

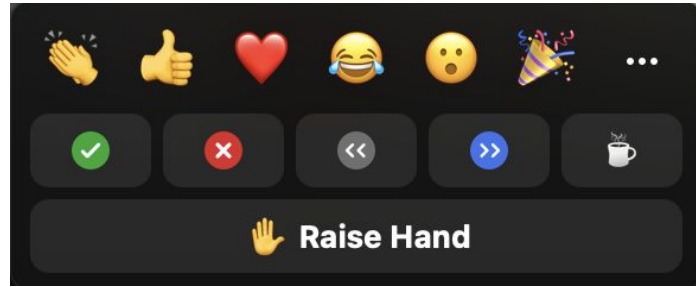
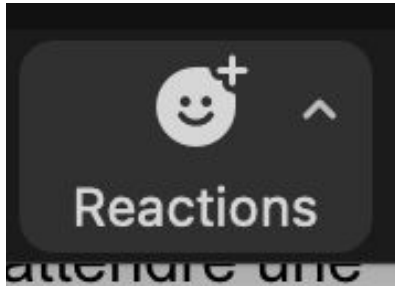


Rename yourself!

First Name - Last Name







Items to Note





Meet your Peers



Guest Lecturer

Lecturer



Molly Willats

Head of Financial Health
and Ontario Lead



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Break



Guest Speaker

Guest Speaker



Abhishek Bhasin

Head of Product



Uplinq



Wrap up



Layial El-Hadi

Executive Director





Course 7 Agenda | Wrap-Up

- Provoking Thoughts
- Course Review | Biggest Takeaways
- Certificate Objectives
- Expectations Review
- Network Expansion
- What next?
- Photo time
- Closing



Provoking Thoughts?

Provoking Thoughts?

- What are some of the biggest challenges fintechs are facing today?
- Why does the ecosystem think that open-banking will create a huge positive shift?
- What would you say is needed for the Canadian fintech ecosystem to thrive?
- Has your opinion on fintech changed since the start of the program?
- What is the next trend that is going to hit the ecosystem?



Courses Review Biggest Takeaways

Course 1 | Ecosystem Introduction



Fintech | Techfin | Everything is fintech

Unbundling banking services

Uptake of fintech

Fintech across Canada

Fintech verticals

Fintech formula

Future predictions

Key stakeholders

Technologies

Course 2 | Regulations & Open-Banking



Role of regulations

Regulator's dilemma

Regtech | Suptech

Categories of regtech

Open-banking

Screen Scraping

Regulatory-driven vs. Market-driven

Course 3 | Building Blocks of AI



Machine Learning

AI challenges

Unethical AI



Role of Payments Canada

Payments

Payment instrument

Payment participants

Payment types

Lynx

Real-time rail

Fintech relationships

Challenges for banks & fintechs

Course 5 | Blockchain Overview



Usages

Cryptography

Ethereum

CBDC

Course 6 | Fintech Valuations



Thesis

Sourcing

Screening

Due-diligence

Term-sheet

Trends in VC

Challenges

Course 7 | Fintech Health and ESG



Financial Health

Frameworks

ESG



Certificate Objectives

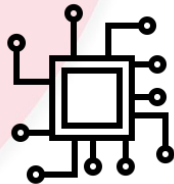
Certificate Objectives

- ❑ Understand the world of fintech and how it is present in everyday life.
- ❑ Gain awareness on definition of terms used in the field (terminology and jargon).
- ❑ Gain an overview of the ecosystem and the various fintech sectors.
- ❑ Develop a portrait of fintech trends: where are we and what the future holds.
- ❑ Interact with local fintech companies to fully understand the challenges they are going through.

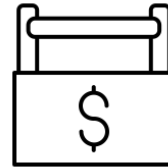
Certificate Outcomes



1. Understanding of ecosystem



2. Working comprehension of technology



3. Grasp of financial industry



4. Future trends and opportunities



5. Risk and challenges



Expectations review

Expectations Of Program

- ❑ ✓ Preparation of content prior to class
- ❑ ✓ Cater to various levels of experiences
- ❑ ✓ Have a good mix of theory and practical (coding practicals)
- ❑ ✓ Fintech addressed in each topic
- ❑ ✓ Go in depth on regulations
- ❑ Global perspectives - ish
- ❑ ✓ Address the positive of what is happening in fintech as well as the critical
- ❑ ✗&✓ Understand the commercialization processes
- ❑ ✓ Get connected with founders/innovators and their ideas
- ❑ ✗&✓ Market entry strategies
- ❑ ✓ Opportunities to connect with guest speakers outside of course

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Network Expansion

Guest Experts



[Jonathan Dextras-Romagnino](#)
VP Baking at RBCx



[Jeremy Clark](#)
Associate Professor, Concordia



[Roy Kao](#)
Board Member, Open Finance Network Canada



[Lise Estelle Brault](#)
Senior Director Data, AMF



[Dr. Ruslan Goyenko](#)
Associate Professor, McGill



[Donna Bales](#)
Founder, Canadian
RegTech Association



[Tony Daccache](#)
Manager API, Network Services



[Jan Christopher Arp](#)
Founding Manager Partner, The Holt
Xchange



[Anshul Tripathi](#)
Manager, ISO 20022



[Jane Podbelskaya](#)
Principal, Information Venture



[Lars Boggild](#)
Impact Investment Manager, Vancity

Guest Startups



Philip Barrar



Jennifer Arnold



Abdi Hersi



Austin Hubbell



Kevin Sivadas



Alix Melchy



Dr. Mohamad Sawwaf



Nic Beique



Abhishek Bhasin





Fintech Resources





What's Next?

Certificate Wrap-Up + Let's take a photo!

- **What next?**
 - We are hiring!
- **How do I maximize this?**
 - Add it to your LinkedIn
 - We will be releasing an SM post with all your names next week*
 - Update CV
 - Add all our guest speakers to your network
 - Reach out to them and hop on a catch up call
 - Reference letters - available on request
- **Fintech Drinks - Every Quarter (In person & Virtual)**
- **Fintech Challenge - To be launched in October**
- **Fintech ecosystem | Involvement**
 - Follow us closely ;) Socials & Slack!
 - What interested you most - Section & Vertical?
 - Startups & jobs in the sector.
 - Reach out to us - we are always looking to help.



Photo Time

Closing

- Stay on the lookout for this course materials on the Certificate Drive Folder (Recordings, slides, resources & references)
- You will receive your Diploma by the end of next week
- Certificate | Overall Survey will be sent today - **PLEASE Fill it out by Friday, May 5th**
- For any questions email maria@fintechcadence.com



Thank you!