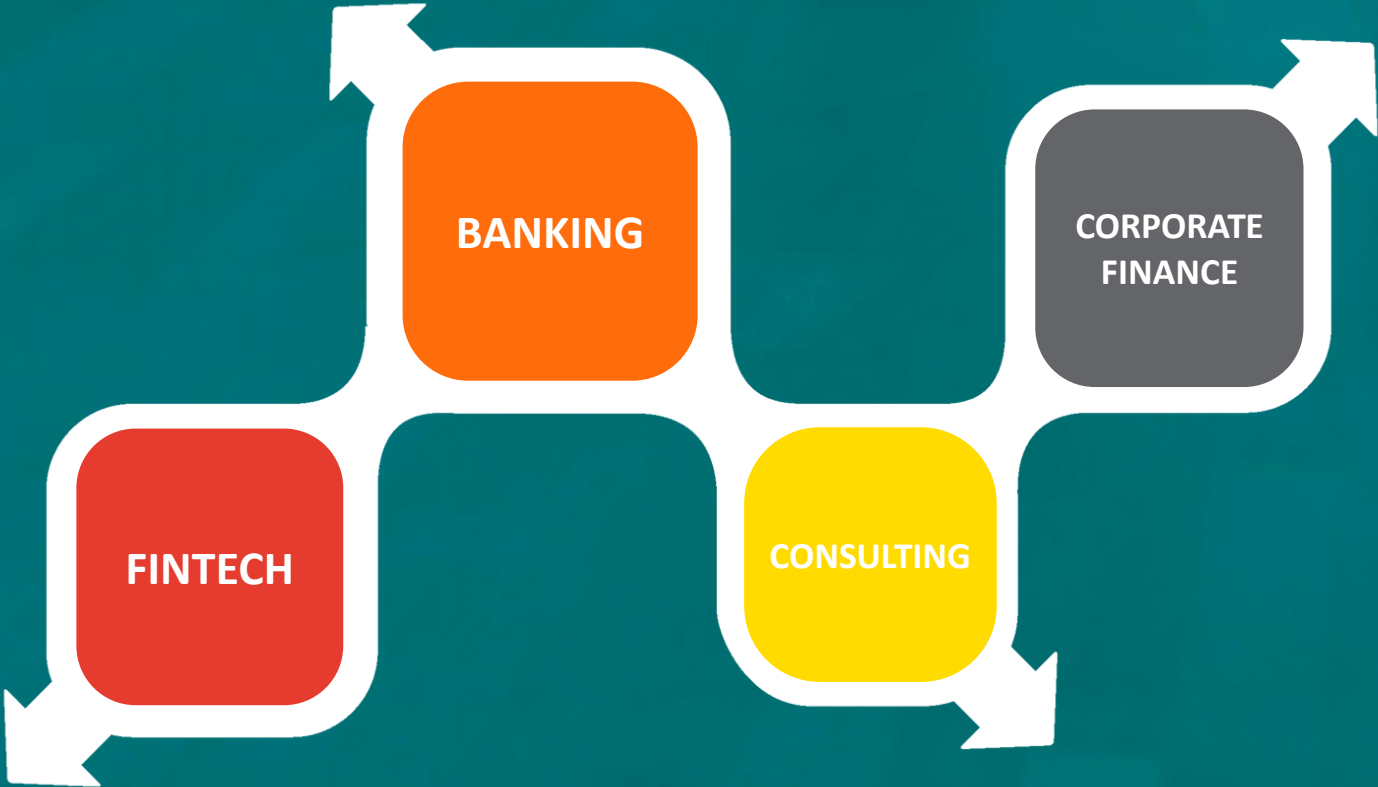


Bearing Fintech Workshop 2019



Bearing 2019

Bearing is a management consulting company with offices in Slovakia and the USA. Our field of expertise is bank management, corporate finance, assets and liability management, and Treasury and private banking, as well as utilization of new technologies in the financial sector (fintech).

Bearing has a long-term experience with banking and bank management. Our bank trainings, simulations, E-learning, education programs, consulting and coaching result in improved processes and efficiency for our customers, who achieve significant time and costs savings.

We use state-of-the-art education methods linked with practice. We apply the recent know-how and current bank regulation during our programs. We combine improvement of hard skills with soft skills at our trainings in cooperation with our trusted business partners.

Training Programs and Business Simulations

Bearing training programs represent multi-level blended learning. They are usually composed of several parts: E-learning, workshops, PC business simulations and exams completed by certification.

Short Workshops

Bearing workshops are 1-2 days trainings on real professional topics. They always comprise a lot of practical examples and case studies. We perform hybrid workshops on some selected topics, which combine training in hard and soft skills.

E-learning

Bearing E-learning is simple and user friendly. It contains comprehensive texts, scripts and multi-level professional tests. It is dedicated for banking experts seeking deep know-ledge.

CFI on-line courses are designed to provide participants with in-demand industry knowledge, hands-on practice, and confidence that will help you stand out from competition and become a world-class financial analyst.

Exams and Certification

A Bearing certificate can be achieved by passing the final exam, which takes place at given time in the form of E-learning tests. A Bearing certificate contains a detailed description of the passed exam, including all topics. Bearing issues all certificates in English.

The Financial Modeling & Valuation Analyst (FMVA)[®] certification program by CFI is suitable for participants of various professional backgrounds. This excellent education covers financial modeling, valuation, accounting and financial analysis topics, from introductory to intermediate and advanced levels.

Consulting and individual coaching

Bearing provides its customers with consulting services and individual coaching. Through our consulting project we help our customers become more efficient and to improve their performance.

Fintech Workshop

Fintech and Regtech are changing the banking industry. This workshop presents comprehensive explanations of the relevant concepts of fintech application in finance. Fintech workshop discloses information about fintech evolution, software apps and fintech products implementation, blockchain technology and crypto assets, financial modeling, big data usage and fintech relevance for regulatory requirements.

- ▶ Introduction to Fintech and Regtech
- ▶ Fintech history and evolution
- ▶ Fintech applications and software development
- ▶ Fintech products diversity - payment systems, open banking, crypto currencies/crypto assets, electronic trading platforms, big data models
- ▶ Blockchain technology, distributed ledger and its application in financial industry – bitcoin and other cryptos, related risk, regulation of crypto assets, initial coin offering (ICO)
- ▶ Fintech in trading systems, electronic trading platforms, suitable financial market products (e.g. CFD, derivatives), high frequency trading (HFT) and automated trading systems (ATS), intelligent market analysis, automated advice, momentum trading, social networks trading, usage of AI/ML
- ▶ Financial modeling with big data usage - risk management and ALM modeling (FTP definition, liquidity risk, budgeting, risk scenarios, replication portfolios, capital and liquidity allocation ICAAP/ILAAP), financial analysis, AI/ML usage
- ▶ Improvement of internal bank processes with fintech/regtech, higher efficiency and cost reduction
- ▶ Future of fintech/regtech in financial industry
- ▶ Business case studies and strategic discussions, blockchain explanation on excel model

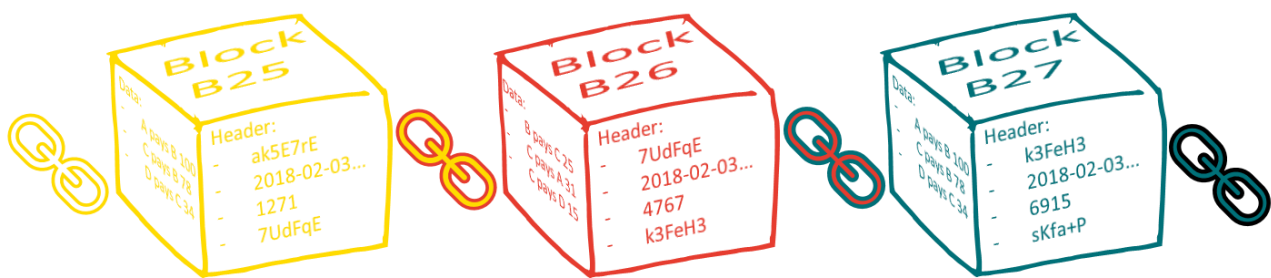
Bearing E-learning module

Recommended chapters:

- ▶ Fintech (12 pages, 80 questions)
- ▶ Blockchain (approx. 10 pages, 90 questions)

All other parts of Bearing E-learning with approx. 1000 questions will available to each participant of Fintech Workshop:

Bank management and Strategies • Controlling and internal rates (FTP) • Assets and Liabilities Management (ALM) • Risk Management • Treasury and Financial Markets • Bank Regulation • Private Banking • Markets in Financial Instruments Directive (MiFID II) • Fintech • Blockchain • Treasury Sales



Target Group

- ▶ Bank managers/prospective managers
- ▶ Project managers, innovators and strategic managers, managers of bank processes
- ▶ Treasury and ALM professionals interested in new technologies
- ▶ Retail, SME, Corporate, Private Banking with focus on efficiency management and new technologies in banking sector
- ▶ Other interested bank professionals and experts (risk managers, regulation, back- & middle-office, business analysts, marketing)

Scope of Services

- ▶ Bearing E-learning full access for 3 months: text, script, multi-level testing
E-learning support: Questions of participants can be addressed to the lecturer directly from the e-learning module, answers usually up to 2 business days
- ▶ E-learning performance statistics for workshop organizer: overall group performance, # of questions, success rate
- ▶ Workshop – preparation, PDF documentation, case studies and explanations, Bearing excel model, holding of the workshop on-site
- ▶ Language: English
- ▶ Location: on-site ¹
- ▶ Lecturer: Martin Macko
- ▶ N° of participants/workshop: recommended 12-15, max. 18
- ▶ Dates: 28 Nov 2019

¹ We assume that the workshops will take place in your company's premises.

Price

	Note	Price
Bearing E-learning	Bearing E-learning (3 months full access)	EUR 76 / participant
Workshop with case studies	Workshop (1 day)	EUR 2000 per group (unit price) + EUR 1000 preparation & other related costs
	Travel costs	included
TOTAL		EUR 3000 + EUR 76/participant

- ▶ 1 group for a workshop: max. 18 participants
- ▶ There will be charged no additional costs. The price already includes travel and accommodation costs of the lecturer within EU, as mentioned above
- ▶ There are not included any costs for seminar premises and catering for participant, i.e. there is assumed that the workshops will take place at the company's premises
- ▶ The prices are valid only by booking the total program for all groups
- ▶ All prices are without VAT. The invoice must include a valid VAT number of both parties. (according to EU legislation). The price is VAT exempt.

We are fully committed to the successful realization of this training program so that all participants can apply the know-how acquired in daily work as soon as possible and in the best quality, according to recent standards.

Lecturer's profile



Martin Macko

Founding Partner and Managing Director, Bearing s.r.o.

Extensive experience in Bank Management, Bank regulation, Assets and Liabilities Management, Market Risk Management, Treasury & Financial Markets, Private banking, Software Model in Fintech/Regtech. Direct long-year experience as lecturer, as well as consultant and leader of many projects in above mentioned areas.

Specialties: Business Consulting, Trainings and Coaching

Education, Certifications

- ▶ 2003 - ACI Dipl. - ACI - The Financial Markets Association
- ▶ 1994 - Ing. (equiv. to MSc.) - Slovak Technical University, Bratislava
- ▶ 1992 - State Language School (German Language)

Experience

- ▶ 2007 – present: Founding partner and managing director, Bearing, s.r.o.
- ▶ 2008 - 2015: exclusive Partner, Finance Trainer s.r.o.
- ▶ 2002 – 2007 Director of Treasury Division, UniBanka, a.s. Bratislava, UniCredit Group
- ▶ 2005 – 2006 Director of Treasury Division, Živnostenská Banka, a.s. Prague, UniCredit Group (parallel to UniBanka assignment)
- ▶ 1999 – 2002 Director of Treasury Department, Istrobanka, a.s.
- ▶ 1994 – 1999 Money market and FX dealer, Istrobanka, a.s. Bratislava

Additional experience

- ▶ Lecturer: Comenius University Bratislava – Strategic Management of Financial Institutions
- ▶ Trainer: in-house education programs at several banks (Bank Management, ALM and risk management, Treasury, Private Banking); public seminars organized by Finance Trainer (ALM and Treasury)
- ▶ Implementation and consulting projects in area of financial markets and ALM (Transfer price system for interest, liquidity and credit spread, Basel 2/3)
- ▶ Head of several internal banking projects (e.g. International Markets & Treasury Workgroup, Euro implementation, bank mergers and integration)

Publications

- ▶ 2015 – present: Bearing E-learning script and multi-level tests
- ▶ 2011 – 2012 Financial Markets in a Nutshell (a series of articles), Bank*Forum at Finance Trainer
- ▶ 2002 - 2003 - 2 expert articles in international magazine "The Journal of Money and Banking - Bančni vestník" about banking system in Slovak Republic

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