



Press release

CTBC Bank bags 7 honors at wealth management awards

TAIPEI, Taiwan, Aug. 31, 2022—CTBC Bank has won seven honors at the 2022 Wealth Management Banking Awards hosted by Business Today magazine, including the Best Wealth Management Bank prize for the 12th year.

The company was also honored with six other awards, namely for Best Customer Satisfaction, Best Commodity, Best Processing Team, Best Wealth Value Added, Best Digital Experience, and Best Smart Wealth Management.



Taiwan Vice Premier Jong-Chin Shen presents an award to CTBC Bank executive vice president Amy Yang at the 2022 Wealth Management Banking Awards hosted by Business Today magazine. (Provided by CTBC Bank)

CTBC Bank said the recognition highlights its ESG and financial inclusion efforts as well as its success in using wealth management to provide for the needs of every generation.

Fellow CTBC Holding subsidiary CTBC Securities also earned the Best Wealth Value Added and Best Marketing Innovation honors. It said the awards were a testament to its efforts in recent years to expand its product line and lower investment thresholds to realize the goal of inclusive finance.

Speaking at the awards ceremony, CTBC Bank executive vice president Amy Yang said the company was creating wealth management services beneficial for all by focusing on “friendly guidance,” such as by setting up a unit dedicated to reminding customers about financial transactions they may need to make; “friendly facilities,” such as by providing accessible and visually impaired-friendly ATMs; “friendly services,” such as offering simplified voice-based menus and personalized services for older people as well as video-based appointments, sign language interpreting, and bilingual branches; and



“friendly financial management,” such as through remote financial management, smart financial management, small-value financial management, and consulting on reverse mortgage loans.

CTBC Bank provides diverse wealth management services for individuals, families, and corporate customers. According to statistics from the Financial Supervisory Commission, as of July 2022, CTBC Bank managed assets of NT\$123 billion, accounting for 30% of the market’s business volume and over 40% of customers, making it the largest “financial management 2.0” service bank in Taiwan.

Furthermore, to realize its sustainable financial vision, CTBC Bank has been proactively incorporating ESG evaluation criteria into the investment product selection mechanism of its wealth management operations. It has also added an ESG-themed investment area to its website.

CTBC Bank also provides a range of financial products for customers with different risk appetites in accordance with market changes and investment habits. For the emerging wealth management group more accustomed to digital wealth management, smart tools such as “Smart Go,” “Penny Piggy,” and “Invest Smart” can boost their independent financial service experience. For customers who need professional consultations, CTBC Bank has 354 CFP®-certified International Certified Senior Financial Advisors, 417 RFA-certified Retirement Financial Planning Advisors, and 71 certified Senior Financial Planning Advisors, and is constantly training new staff as Family Trust Planning Advisors.

Furthermore, in support of the “Trust 2.0” policy, CTBC Bank is committed to creating a comprehensive trust plan, achieving the objectives of welfare and lifestyle care, family business inheritance planning, and social welfare feedback. To such ends, the bank has launched an innovative multifaceted insurance fund trust that integrates various types of assets into the same trust for unified management, improving the care of beneficiaries.

In addition, CTBC Securities also won the “Best Wealth Growth Award” and “Best Marketing Innovation Award” in these awards.

The Business Today awards are the latest in a string of recent honors for CTBC Bank’s wealth management. The bank has also recently been recognized as having Taiwan’s best wealth management and private banking by Euromoney as well as named Taiwan’s best high-asset customer service bank by Asiamoney, included on “The Innovators” index by Global Finance, and named Best Private Bank for Digitally Empowering RMs—Asia at Professional Wealth Management’s Wealth Tech Awards.



Financial Supervisory Commission Chairman Tien-Mu Huang, left, gives an award to C.T. Hsieh, deputy general manager of CTBC Bank’s Wealth Management Products Division, at the Wealth Management Banking Awards. (Provided by CTBC Bank)



C.T. Hsieh, right, deputy general manager of CTBC Bank's Wealth Management Products Division; Amy Yang, center, executive vice president of CTBC Bank; and Hsiu-Ling Hsu, deputy general manager of CTBC Securities, poses with their companies' awards. (Provided by CTBC Bank)

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About CTBC Bank

CTBC Bank, a subsidiary of CTBC Holding (TPE: 2891), was established in 1966 and has been helping build customers' personal wealth and Taiwan's economy for more than 50 years. In addition to its 152 branches nationwide, CTBC Bank has the most extensive international presence of any Taiwanese bank, with 116 overseas branches across 14 countries and regions. Having purchased a subsidiary, The Tokyo Star Bank, in Japan and having established CTBC Bank subsidiaries in the U.S., Canada, the Philippines and Indonesia, the Bank has laid a strong foundation for regional business, providing international enterprises with comprehensive transnational financial services.

Looking ahead, we plan to continue optimizing our international service network as well as to provide our customers with even more convenient global services. We will also continue to expand our efforts in operational performance, corporate governance, corporate social responsibility and environmental sustainability as we cement our status as "Taiwan Champion, Asia Leader."