Digital Integration in Wealth Management 2023

21st – 22nd February 2023 | Royal Lancaster Hotel

Chair: Stephen Walker, Lead Analyst, Thematic & Fintech Research, GlobalData
Chair: David Bicknell, Principal Analyst, GlobalData
James Frew, Divisional Director – Operational Strategy, St James' Place Wealth Management
Matthew Proctor, Associate Director, Strategic Programmes, Asset Management, Coutts and NatWest Group
Konan Motihar, Head of Digital, Design and Experience, Coutts and NatWest Group
Mark Glover, Global Head of Financial Planning – Wealth Management, HSBC
Martijn Seijsener, Global Head Employee Experience, Credit Suisse
Kara K W Byun, Head of Fintech, Venture & Growth Investments, HSBC Asset Management
Tapas Sharma, Head of Brand Design, Nutmeg
Adele Goodfellow, Product Marketing, Chief Technology Office, JP Morgan Chase & Co
Emma Tilt, Head of Personal Investing, Fidelity International
Nick Hall, Head of Advice, Wealth Wizards
John Thompson, Head of Digital Product Management, abrdn
Jean-Marc Bonnefous, Managing Partner, Tellurian Capital Management LLP
Carlota van de Koppel, Chief Operating Officer, Bedrock Group
Kate Hobson, Chief Digital Officer, Executive Office, Bedrock Group
Anna Szkudlarek, Partner, Digital Transformation, KENDRIS
Patrick Thomas, Investment Director and Head of ESG Service, Canaccord Genuity Wealth Management
Zoe Robson, Creative Director and Global Head of Innovation, Architas
Aliya Das Gupta, Senior Vice President of Business Development, Sygnum Bank
Fadi Halout, Chief Executive Officer, BankMed (Suisse) SA
Romain Braud, Digital Assets Business Development Director, Arab Bank (Switzerland) Ltd.
Matt Lonsdale, Head of Business Development, Wealth UK, Iress
Benjamin Labrousse, Manager Pre-Sales EMEA, Wealth Dynamix
Christopher Baxter, Presales Consultant, Aixigo
Adam Toms, Global COO and CEO Europe, OpenFin
Ed Sewell, Data Strategy Partner, CACI
Marc Mettler, Board Member and Managing Partner Business Development, 3rd-Eyes Analytics
Senior Representative from Moxo
Senior Representative from InvestCloud
Senior Representative from Ortec Finance
Senior Representative from CID
Senior Representative M-Files
Senior Representative from Seismic
Senior Representative from SmartCommunications
Senior Representative from Nucoro
Senior Representative from Objectway
Senior Representative from KA Watson Consultancy
Senior Representative from Quantfolio

DAY 1 |21st February 2022

08.00	Registration

08.50 **Chair's welcome address**
Chair: Stephen Walker, Lead Analyst, Thematic & Fintech Research, GlobalData

09:00 **Keynote address**
Artificial Intelligence and Machine Learning in St. James' Place Wealth Management
- How does St James' Place Wealth Management use artificial intelligence today?
- How is St James' Place managing the changes that AI brings to existing roles?
- How we see AI evolving in wealth management
- How we identify opportunities
- Why AI is of benefit to our Partners and their clients

James Frew, Divisional Director – Operational Strategy, St James' Place Wealth Management

09:30 **Session Reserved for Moxo**
Senior Representative from Moxo

10.00 **How Banks are Changing their Customers' Perceptions of Investing**
- With the current crisis of low interest rates, how do we encourage customers to invest?
- Examining the FCA's key objective to move customers with long term cash savings and exploring the industry's response
- How do we help nervous cash savers invest?

Matthew Proctor, Associate Director, Strategic Programmes, Asset Management, Coutts and Natwest Group

10:30 **Can a Hybrid Servicing Model Transform your Wealth Management Firm?**
- Embracing new technologies to deliver hybrid servicing and create a highly differentiated, cost-effective service proposition for existing and future clients could be the key to fortifying your Wealth Management firm.
- The Hybrid Servicing model is growing in popularity as populations become more digitally adept, and a younger demographic of High-Net-Worth (HNW) and Ultra-High-Net-Worth (UHNW) individuals start to impact the current benchmarks for client servicing and the accessibility of their financial data. Yet not all parts of the Wealth Management industry have readily embraced these opportunities
- Wealth Dynamix expert Benjamin Labrousse explains how firms can successfully integrate new technologies for increased profitability and, just as importantly, manage the risks of doing so

Benjamin Labrousse, Manager Pre-Sales EMEA, Wealth Dynamix

11:00	**Networking break – visit exhibition hall**	
11:30	**Stream A** **Front end, client-facing technology** **Panel Discussion. It's All About the Client, Not You!**	**Stream B** **Back Office and Middle Office Integration** **Panel discussion. What's Next on the Digital Front: Innovative Technologies in Wealth Management**

	Stream A	Stream B
	• How can an organization develop products that meet the clients' needs and demands? • Maximizing data to provide a more personalized and focused approach for clients to reach their financial goals • Aiding clients with all aspects of their wealth management and not just at the advisory stage • Offering clients a variety of options depending on a products' risk appetite **Konan Motihar, Head of Digital, Design and Experience, Coutts and NatWest Group** **Emma Tilt, Head of Personal Investing, Fidelity International** **Anna Szkudlarek, Partner, Digital Transformation, Kendris** **Matt Lonsdale, Head of Business Development, Wealth UK, Iress** **Senior Representative from Moxo** **Senior Representative from InvestCloud**	• Exploring innovative technologies in Wealth Management landscape • Investigating the data science revolution and AI in Wealth Management • Understanding the opportunities and challenges around innovative technologies **Chair: David Bicknell, Principal Analyst, GlobalData** **Kara K W Byun, Head of Fintech, Venture & Growth Investments, HSBC Asset Management** **James Frew, Divisional Director – Operational Strategy, St James' Place Wealth Management** **Adam Toms, Global COO and CEO Europe, OpenFin** **Ed Sewell, Data Strategy Partner, CACI**
12:00	**Revolutionizing Digital Retirement Solutions** • **Identifying retirement as the key issue for most people in the UK** • **Tackling the challenge of underfunded provisions and the urgent need for engagement** • **Assessing how development in the pension industry is facilitating digital accelerations, e.g., pension dashboard, open banking and development of the truster market** **Mark Glover, Global Head of Financial Planning – Wealth Management, HSBC**	**High Tech, High Touch: Multi-Family Office Digitalisation Strategy for a Competitive Advantage** • Back-end transformation for improved process optimization • Automate legacy processes to heighten productivity • Finetune your firm's services to boost client onboarding **Anna Szkudlarek, Partner, Digital Transformation, KENDRIS**
12:30	**Session Reserved for Ortec Finance** **Senior Representative from Ortec Finance**	**Session Reserved for CID** **Senior Representative from CID**

13:00 **Lunch break and networking**

14:00	**Stream A** **Front end client-facing technology**	**Stream B** **Back Office and Middle Office Integration**
	Turning Financial Advice on it's Head! – Empowering People Through Smart Digital • What if our clients (and we) could feel more empowered in the Advice relationship? • What if our clients could enjoy really engaging digital experiences? • What if client information flowed more easily?	**Towards a Fully Digital End-to-End Management of Clients** • Exploring how the digitization of the operational processes can take your business to the next level and compete with some of the world-leading banks • Providing clients with an easy and smooth journey: from onboarding to the end • Using AI to automate mundane

Time		
	• What if they (and we) could automatically receive timely meaningful client insights? And be able to easily act on them? • What if all this transformed the way Financial Advice works for Client and Advisers? **John Thompson, Head of Digital Product Management, abrdn**	**Fadi Halout, Chief Executive Officer, BankMed (Suisse) SA**
14:30	**How to Increase Customer Lifetime Value with Cashflow Planning** • In recent years cashflow planning has become a key component of financial advice. • Especially within the current climate where many have seen a change in circumstances, a cashflow plan helps advisers & clients to make decisions. • However, is it time to rethink cashflow planning? A cashflow planner is an incredibly powerful tool which when used correctly can be the backbone of new and exciting usecases. • In this presentation I will present our views and how cashflow planning solutions can be used to create innovative, new customer journeys in the future to help win new clients and increase the customer lifetime value significantly. **Christopher Baxter, Presales Consultant, Aixigo**	**Session Reserved for M-Files** **Senior Representative from M-Files**
15:00	**Panel Discussion: Digital Family Office: Paving the Way for the Next Generation of Family Members** • Meeting the family office's unique financial needs • Offering a range of bespoke, client-centered services • Cost savings associated with a decentralized, technology-driven approach • Opportunities for current players and service providers **Session Available for Panellists**	**Investing in Disruptive Innovation** • Optimizing processes by automating back-end operation and management of desired investment strategies • Using technology, i.e., straight-through processing systems to provide prompt notifications to clients on trades and portfolio updates • Leveraging AI to preserve advisor time for high-value strategic conversations • Implementing an enterprise-wide customer relationship management (CRM) system to ease the flow of information among stakeholders, facilitate more efficient decision-making and improve service at the distribution level • Can AI in Operations help you reach the next stage of the business?

		Patrick Thomas, Investment Director and Head of ESG Portfolio Management, Canaccord Genuity Wealth Management
15:30	**Session Reserved for Invest Cloud** **Senior Representative from Invest Cloud**	**Session Reserved for Seismic** **Senior Representative from Seismic**

16:00 **Networking break – visit exhibition hall**

16.30 **Panel Discussion: What's the Future for Wealth Management?**

- Exploring the future for wealth management
- Investigating how to tailor your business to your clients' needs, especially those of the younger generation who are more tech-savvy

Zoe Robson, Creative Director and Global Head of Innovation, Architas
Romain Braud, Digital Assets Business Development Director, Arab Bank (Switzerland) Ltd.
Senior Representative from Nucoro

17:00 **Blockchain Integration Journey**

- Integration digital assets into an existing banking infrastructure
- Building digital assets services for private clients, institutions and external assets managers
- Blockchain enhances banking operations in commodities trade finance

Romain Braud, Digital Assets Business Development Director, Arab Bank (Switzerland) Ltd.

17:30 **Drinks Reception Reserved for Moxo**

18:30 **Bespoke Private Dinner (Available for Sponsorship)**

DAY 2 | 22nd February 2022

08.00	Registration

08:00 Exclusive Breakfast (Invitation Only) Reserved for **Moxo**

08:50 **Chair's opening remarks**
Chair: Stephen Walker, Lead Analyst, Thematic & Fintech Research, GlobalData

09:00 Keynote address: Panel Discussion, On Facilitating Digital Integration
On Facilitating Digital Integration in Wealth Management

- What are the best methods to facilitate digital integration?
- What is the best process to enable clients and advisors, as well as your business as a whole to adapt to digital technologies?
- What does the future lie for fintechs and banks partnerships when it comes to digital integration?

Aliya Das Gupta, Senior Vice President of Business Development, Sygnum Bank
Senior Representative from M-Files

09:30 **Session Reserved for Objectway**
Senior Representative from Objectway

10:00 **A Hybrid Utopia – Driving the Future of Advice**

- The myth of Robo-Advice
- Consumer led – human assisted advice
- Empowering Wealth Managers to drive experiential client opportunities
- Using algorithmic logic to drive consistently great customer outcomes
- Hybrid advice – the only viable option

Nick Hall, Head of Advice, Wealth Wizards

10:30 **Show Me The Money!**

- The first rule of a customer-centric is to make money. The second rule is don't forget rule one.

Matt Lonsdale, Head of Business Development, Wealth UK, Iress

10:45 **Networking break – visit exhibition hall**

11:15

Stream A
Front end client-facing technology

The Road to Better CX: Reignite Growth by Optimising the Employee Experience

- Next level user experience with hyper personalization
- Chatbots and conversational banking
- Self-guided journeys with a personal touch

Martijn Seijsener, Global Head Employee Experience, Credit Suisse

Stream B
Back Office and Middle Office Integration

Brand and Design – A Tale of Two Specialisms

- How branding influences consumer behavior and perception
- The best things come in two's – Why branding and design go so well together
- Why focus on digital integration and a digital first approach
- Implementing Nutmeg's rebrand during the pandemic

		• The future of digitally influenced brand design – the possibilities are endless **Tapas Sharma, Head of Brand Design, Nutmeg**
11:45	**The Implications of Climate Change on Wealth Management** • Why is it relevant? How does it affect clients? How to cope with it? • To model future wealth realistically, climate change must be considered in wealth planning. • However, the main problem is that both institutional and private investors cannot draw any conclusions about the impact rising temperatures have on their wealth or financial goals. • 3rd-eyes analytics makes the impact of climate change tangible, by showing how it affects your portfolio and your financial goals, how the impact can be mitigated and offer solutions on how to further reduce the CO2 footprint. **Marc Mettler, Board Member and Managing Partner Business Development, 3rd-Eyes Analytics**	**Session Reserved for KA Watson Consultancy** **Senior Representative from KA Watson Consultancy**
12:15	**How to Deliver Digital Assets Investment Products to Wealth Management Clients?** • Exploring a regulatory framework for distribution • An offer of institutional-grade investments products • A dedicated execution and risk management system **Jean-Marc Bonnefous, Managing Partner, Tellurian Capital Management LLP**	**The World's First Digital Asset Bank – Accelerating the Expansion of Web 3.0 Offerings and New Global Markets** • Configuring secure infrastructure, operations and future services to meet your client's needs • Decentralised finance (DeFi) – using crypto and blockchain to manage transactions • Building sustainable wealth in the Metaverse • Regulating crypto and managing risk **Aliya Das Gupta, Senior Vice President of Business Development, Sygnum Bank**
12:45	**Session Reserved for SmartCommunications** **Senior Representative from SmartCommunications**	**Silver Sponsor (Available)**
13:15	**Lunch break and networking**	

14:15 **The Power of Communicating Effectively in the World of Tech**

- Communicating effectively is vital in the tech world and it is not just about having the right digital tools, but knowing when to speak up and engage with other engineers in order to collectively achieve success
- Adele provides an overview of the 'DISC model' and reveals clues on how you can identify and better connect with colleague's personality styles. She will provide top tips on creating presentations and communicating messages
- Adele shares her experience as a Toastmaster for the past ten years. What is it and how can Toastmasters benefit your world and personal life?

Adele Goodfellow, Product Marketing, Chief Technology Office, JP Morgan Chase & Co

14:45 **Session Reserved for Quantfolio**
Senior Representative from Quantfolio

15:15 **Networking break – visit exhibition hall**

15:45 **Digital Transformation: The Female Factor**

- Market Trends
- Investment Requirements
- Experience Considerations
- Cultural Impact

Carlota van de Koppel, Chief Operating Officer, Bedrock Group
Kate Hobson, Chief Digital Officer, Executive Office, Bedrock Group

16:15 **Digital Trends in Wealth Management**

- Mapping out the progress of digital transformation in the wealth management industry
- Examining Covid-19s impact on the digital wealth space
- Exploring the evolution of digital investment platforms and their transition to becoming a one stop shop for consumer finance
- Investigating how traditional wealth managers and non-financial services providers collaborate with technology experts
- Understanding client demand to provide a better high-tech high-touch customer experience

Senior Representative from GlobalData

16:45 **Close of conference**