# Digital Integration in Wealth Management 2023

21st – 22nd February 2023 | Royal Lancaster Hotel

**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**
**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**
**Charles-Henry Monchau, Chief Investment Officer, Banque Syz**
**Carlota van de Koppel, Chief Operating Officer, Bedrock Group**
**Kate Hobson, Chief Digital Officer, Executive Office, Bedrock Group**
**Anna Szkudlarek, Director and Head of Product (Digital) KENDRIS**
**Antonio Curia, Executive Director (FCA) (Head of Private Capital Advisory), Wimmer Financial LLP**
**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**
**Matt Lonsdale, Head of Business Development, Wealth UK, Iress**
**Adam Toms, Global COO and CEO Europe, OpenFin**
**Senior Representative from Moxo**
**Senior Representative from Wealth Dynamix**
**Senior Representative from InvestCloud**
**Senior Representative from Ortec Finance**
**Senior Representative from CID**
**Senior Representative from Aixigo**
**Senior Representative M-Files**
**Senior Representative from Seismic**
**Senior Representative from SmartCommunications**
**Senior Representative from Nucoro**
**Senior Representative from Objectway**
**Senior Representative from 3rd – Eyes Analytics**
**Senior Representative from CACI**
**Senior Representative from KA Watson Consultancy**

# DAY 1 |21st February 2022

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|---|---|
| **08.00** | **Registration** |

**08.50** **Chair's welcome address**

## Keynote address

**09:00** **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** **Session Reserved for Wealth Dynamix**
**Senior Representative from 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!**

- 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**

**Stream B**
**Back Office and Middle Office Integration**

**Panel discussion. What's Next on the Digital Front: Innovative Technologies in Wealth Management**

- 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

**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**

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| | **Emma Tilt, Head of Personal Investing, Fidelity International**<br>**Fadi Halout, Chief Executive Officer, BankMed (Suisse) SA**<br>**Matt Lonsdale, Head of Business Development, Wealth UK, Iress**<br>**Senior Representative from Moxo**<br>**Senior Representative from InvestCloud** | **Senior Representative from CACI** |
| **12:00** | **Revolutionizing Digital Retirement Solutions**<br>• **Identifying retirement as the key issue for most people in the UK**<br>• **Tackling the challenge of underfunded provisions and the urgent need for engagement**<br>• **Assessing how development in the pension industry is facilitating digital accelerations, e.g., pension dashboard, open banking and development of the truster market**<br>**Mark Glover, Global Head of Financial Planning – Wealth Management, HSBC** | **High Tech, High Touch: Multi-Family Office Digitalisation Strategy for a Competitive Advantage**<br>• Back-end transformation for improved process optimization<br>• Automate legacy processes to heighten productivity<br>• Finetune your firm's services to boost client onboarding<br>**Anna Szkudlarek, Director and Head of Product (Digital) KENDRIS** |
| **12:30** | **Session Reserved for Ortec Finance**<br>**Senior Representative from Ortec Finance** | **Session Reserved for CID**<br>**Senior Representative from CID** |

**13:00** **Lunch break and networking**

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| **14:00** | **<u>Stream A</u>**<br>**<u>Front end client-facing technology</u>**<br>**Turning Financial Advice on it's Head! – Empowering People Through Smart Digital**<br>• What if our clients (and we) could feel more empowered in the Advice relationship?<br>• What if our clients could enjoy really engaging digital experiences?<br>• What if client information flowed more easily?<br>• What if they (and we) could automatically receive timely meaningful client insights? And be able to easily act on them?<br>• What if all this transformed the way Financial Advice works for Client and Advisers?<br>**John Thompson, Head of Digital Product Management, abrdn** | **<u>Stream B</u>**<br>**<u>Back Office and Middle Office Integration</u>**<br>**Towards a Fully Digital End-to-End Management of Clients**<br>• 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<br>• Providing clients with an easy and smooth journey: from onboarding to the end<br>• Using AI to automate mundane<br>**Fadi Halout, Chief Executive Officer, BankMed (Suisse) SA** |
| **14:30** | **Session Reserved for Aixigo** | **Session Reserved for M-Files** |

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| | **Senior Representative from Aixigo** | **Senior Representative from M-Files** |
| **15:00** | **Panel Discussion: Digital Family Office: Paving the Way for the Next Generation of Family Members**<br>• Meeting the family office's unique financial needs<br>• Offering a range of bespoke, client-centered services<br>• Cost savings associated with a decentralized, technology-driven approach<br>• Opportunities for current players and service providers<br>**Antonio Curia, Executive Director (FCA) (Head of Private Capital Advisory), Wimmer Financial LLP** | **Investing in Disruptive Innovation**<br>• Optimizing processes by automating back-end operation and management of desired investment strategies<br>• Using technology, i.e., straight-through processing systems to provide prompt notifications to clients on trades and portfolio updates<br>• Leveraging AI to preserve advisor time for high-value strategic conversations<br>• 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<br>• Can AI in Operations help you reach the next stage of the business?<br>**Patrick Thomas, Investment Director and Head of ESG Portfolio Management, Canaccord Genuity Wealth Management** |
| **15:30** | **Session Reserved for Invest Cloud**<br>**Senior Representative from Invest Cloud** | **Session Reserved for Seismic**<br>**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

**Charles-Henry Monchau, Chief Investment Officer, Banque Syz**
**Zoe Robson, Creative Director and Global Head of Innovation, Architas**
**Senior Representative from Nucoro**

**17:00** **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**

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

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

## DAY 2 | 22nd February 2022

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| 08.00 | Registration |

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

**08:50** **Chair's opening remarks**

**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** **Session Reserved for IRESS**
**Matt Lonsdale, Head of Business Development, Wealth UK, Iress**

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

**11:15**

| Stream A | Stream B |
|---|---|
| **Front end client-facing technology** | **Back Office and Middle Office Integration** |
| **The Hybrid Investment Advisor: How to Combine Digital and Human Factors into an Investment Advisory Offering**<br>• Offering remote but delivering personalized advice<br>• Attracting new clients and reaping significant cost advantages<br>• Digital scaling with a personal touch<br>**Charles-Henry Monchau, Chief Investment Officer, Banque Syz** | **Brand and Design – A Tale of Two Specialisms**<br>• How branding influences consumer behavior and perception<br>• The best things come in two's – Why branding and design go so well together<br>• Why focus on digital integration and a digital first approach<br>• Implementing Nutmeg's rebrand during the pandemic<br>• The future of digitally influenced brand design – the possibilities are endless<br>**Tapas Sharma, Head of Brand Design, Nutmeg** |

**11:45**

**Session Reserved for 3rd-Eyes Analytics**
**Senior Representative from 3rd-Eyes Analytics**

**Session Reserved for KA Watson Consultancy**
**Senior Representative from KA Watson Consultancy**

**12:15**

**Social Communities, Personified Stories and Organic Brand Advocacy: The Next Generation of Financial Customer Engagement**

- If the goal is to survive and thrive in the digitization and democratization of wealth management, we must consider a different strategy
- The key to customer engagement is embedded in:
  - Personified Stories
  - Authentic Brand Advocacy;
  - And, Social Networking

**Zoe Robson, Creative Director and Global Head of Innovation, Architas**

**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** **Silver Sponsor (Available)**

**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** **Thematic Overview of Digital Trends in Wealth Management**
**Senior Representative from GlobalData**

**16:45** **Close of conference**