ARENA INTERNATIONAL EVENTS GROUP

DIGITAL INTEGRATION IN WEALTH MANAGEMENT SWITZERLAND 2023

Zurich Marriott Hotel

4^{th} – 5^{th} October 2023

Key Speakers:

Stela Willemstein, Senior Business Risk Officer, UBS
Alexander Neil, Head of Equity Advisory, HSBC
Timon Wick, Head Project Management, MBaer Merchant Bank AG
Carolina Thomaz, Chief Risk Officer, Itaú
Anna Szkudlarek, Partner, Head of Product, KENDRIS
Philippe Meyer, Head of Digital and Blockchain Solutions, BBVA
Aliya Das Gupta, Senior Vice President of Business Development, Sygnum Bank
Valentin Khatchatourian, Director, Credit Suisse
Nataliya Shybanova, Head of Partnerships, Green Wealth Partners
Steven Blitz, Chief US Economist, TS Lombard
Christos Kontos, CEO, ELIA Investment Advisors
Dr. Dominik Helberger, Head of Private Banking International, Bergos AG
Donato Genovese, Lead Product Development & Business Operations, Swiss Re
Uraitz de Julian Garate, Head Digital Investment Applications, Coutts
James Pereira-Stubbs, Chief Client Officer, Oxford Risk
Ludwig Holle, Managing Director, FINAplus
Dr. Eric Bade, Head Business Transformation & Integration - Executive Director, Sygnum Bank
Delia Steiner, Country Manager CH / LI, Aixigo
Martin de Heus, EMEA Director, Moxo
Thomas Gonfray, Head of Sales Switzerland, Pexip
Dr. Sven Damberger, Managing Director at MVC Mobile Video Communication GmbH
Alexander Stumpfegger, Chief Sales Officer, CID
Craig Butterwork, Chief Commercial Officer, Droit
Kevin Mettenberger, Enterprise Account Executive, ServiceNow
Amine El-Hattami, Applied Research Scientist, ServiceNow
Christine Ciriani, Chief Revenue Officer, International and General Manager, APAC, InvestCloud
Suneet Muru, Thematic Analyst in the Thematic Intelligence team, GlobalData
Dr.Boris Rankov, Head of Product Strategy International (EMEA and APAC), InvestCloud
Dr. Urs Monstein, Chief Operating Officer, VP bank
Cédric Neuville, Director of Pre-Sales & Consulting, EU, Wealth Dynamix

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Digital Integration in Wealth Management Switzerland
Zurich | 4th-5th October 2023
DAY ONE

08:00 – 08:25	**Registration**
08:25 – 08:30	**Chair's Opening Remarks** **Benjamin Hatton, Analyst, GlobalData**
08:30 – 09:00	**The Opportunities for Traditional Finance in Defi** • Learn about the possibilities for innovation in Defi. • Explore the journey Sygnum Bank has been on as the world's first Digital Asset Bank. **Aliya Das Gupta, Senior Vice President of Business Development, Sygnum Bank**
09:00 – 09:30	**Looking to the future of digital integration of wealth management** • What have we done well so far? • The biggest threats, opportunities, and potential solutions. • Identifying key trends in 2023. **Philippe Meyer, Head of Digital and Blockchain Solutions, BBVA**
09:30 – 10:00	**Streamlining Client Business Interactions in Wealth** • Rethink today's costly, inefficient, and fragmented client interaction model requiring significant manual intervention. • Create client interaction workspaces and seamlessly blend contextual unstructured client interactions with structured business actions in one stop. • Provide a private, personalised, and modern client experience and increase retention. • Use actionable business insights to improve team productivity, identify bottlenecks, and drive efficiency. • Maintain account control with a complete audit trail and the seamless transfer of account interactions across staff. • Coordinate with your customers, partners, and teams to achieve joint. **Martin de Heus, EMEA Director, Moxo**
10:00 – 10:30	"Hard optimism meetup" - Major disruptions and breakthrough principles for leading towards the future • Market needs and key influential drivers • Lifestyle impacting client behavior, expectations and their needs • New way of work (NWW) Reengineering employees workdays **Timon Wick, Head Project Management, MBaer Merchant Bank AG**
10:30 – 11:00	**What are Wealth Dynamix's learnings from recent successful deliveries of client lifecycle management solutions for Private Banks in the Cloud?** • Wealth Dynamix has a track record of successful, secure delivery in the Cloud implementing entire Client Lifecycle Management solutions – or via an iterative approach beginning with prospecting and/or onboarding - for clients globally.

	• We take a whistle-stop tour of the key focus areas and learnings to ensure the success of your Cloud migration: ○ **Business & Data Strategy:** How to ensure that the business and data strategy are defined and aligned ○ **Compliance & Security:** How to ensure security and compliance for client identifying data ○ **Infrastructure & Ecosystem:** How future-first technology can be fully embraced ○ **Change Management:** How staff adoption is assured via structured PMO and change management **Cédric Neuville, Director of Pre-Sales & Consulting, EU, Wealth Dynamix**
11:00 – 11:30	**Morning Refreshments and Networking**
11:30 – 12:00	**Panel: Elevating client loyalty through digital transformation** • Discuss how digital tools can increase a user's experience and loyalty. • Explore how digital technology can enable tailored experiences, personalised recommendations, and customised investment strategies. Chair: Benjamin Hatton **Steven Blitz, Chief US Economist, TS Lombard** **Dr. Dominik Helberger, Head of Private Banking International, Bergos AG** **Delia Steiner, Country Manager CH / LI, Aixigo** **Martin de Heus, EMEA Director, Moxo**
12:00 – 12:30	**Unlocking growth through digitisation and behavioural finance** • Unlock a greater share of wallet and retention of assets under management through digital solutions. • Assess, understand, and engage investors' preferences for sustainability and ESG. • Understand investor behaviours to personalise communications with behavioural finance. • Meet European MiFID regulation and growing client demand for sustainable and ESG investments. **James Pereira-Stubbs, Chief Client Officer, Oxford Risk**
12:30 – 13:00	**Fireside Chat: Navigating ESG; what does sustainability look like in wealth management?** • Defining and understanding what ESG is, and how to implement it into practice. • Understanding the future of ESG in wealth management. • Should we be taking ESG seriously? Chair: Benjamin Hatton **Alexander Neil, Head of Equity Advisory, HSBC** **Nataliya Shybanova, Head of Partnerships, Green Wealth Partners**
13:00 – 13:15	**Cut the curve: how banks and wealth managers can realize future-proof innovation efficiently** • What options do banks and wealth managers have to innovate with reasonable effort? • A few pioneers, some fast-followers, a lot of "wait and see": Where should a bank start to innovate? • Innovation from the centre: what it means and how it has helped our customers to cut the curve- an example. **Delia Steiner, Country Manager CH / LI, Aixigo**
13:15 – 14:15	**Lunch and Networking**

14:15 – 14:45	**Harnessing the power of big data** • Unleashing the power of data to understand the economic environment. • Utilizing 'big data' to analyse polices and capital market prices. • Exploring case studies. **Steven Blitz, Chief US Economist, TS Lombard**
14:45 – 15:15	**The fully integrated, AI-enabled wealth manager: From dream to reality** • Beyond CRM: How can we improve the advisor and customer experience today? • Front to back office digitalization: Bridging functional and technical silos to provide a seamless end-to-end experience for everyone and take team work to the next level. • Simplifying, standardizing and automating processes: Where to start? • Finding a reasonable approach to AI: Potential benefits are great but the stakes are high, and errors costly. How to get started? **Kevin Mettenberger, Enterprise Account Executive, ServiceNow** **Amine El-Hattami, Applied Research Scientist, ServiceNow**
15:15 – 15:45	**How is availability of data impacting auto & mobility products? A view from the insurance industry** • Discuss the different mobility trends that are impacting the industry. • Discover the different products for new client needs. • Understand why data is key to assess new risks **Donato Genovese, Lead Product Development & Business Operations, Swiss Re**
15:45 – 16:15	**AI in Wealth Management: A New Era of Opportunity** • Leverage AI to automate tasks and improve efficiency. • Use case: Win more business from mass affluent and (U)HNW individuals. • Use case: Better-informed investment decisions for stronger performance. **Alexander Stumpfegger, Chief Sales Officer, CID**
16:15 – 16:45	**Mid-Afternoon Refreshments**
16:45 – 17:15	**The Next Gen and the future of Wealth Management** • Discuss how technology, digitalization, and personalization are the key to engaging the Next Gen. • What factors should you consider when growing your Next Gen Client Portfolio? - Sustainability and ESG Investing, - Financial Education and DIY Investing, - Inheritance and Wealth Transfer, - Alternative Investments, - Outlook for the changing landscape. **Nataliya Shybanova, Head of Partnerships, Green Wealth Partners**
17:15 – 17:45	**Panel: Transforming the client's experience: The power of personalised digital implementations** • Examining innovative tools and platforms to enhance client experience and aid in client acquisition. • Discover different strategies for fostering new relationships with clients and how to navigate your client's demands. • Identify how personalised financial tools can help wealth managers understand their client's ecosystem. • Recognise the future of client experience and problems you might face. Chair: Benjamin Hatton

	Donato Genovese, Lead Product Development & Business Operations, Swiss Re **Timon Wick, Head Project Management, MBaer Merchant Bank AG** **Philippe Meyer, Head of Digital and Blockchain Solutions, BBVA** **Thomas Gonfray, Head of Sales Switzerland, Pexip** **Dr. Boris Rankov, Head of Product Strategy International (EMEA and APAC), InvestCloud**
17:45 – 17:55	Closing remarks
18:00 – 19:00	**Drinks Reception**

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DAY TWO

08:00 – 08:50	**Breakfast Briefing Sponsor**
08:50 – 09:00	**Chair's Opening Remarks** **Benjamin Hatton, Analyst, GlobalData**
09:00 – 09:30	**Discovering the power of Fintech collaboration to leverage innovation and technology** • Learn how the collaboration with Fintech's can elevate your technological future. • Explore the different solutions to improve operational efficiency, enhance product offerings, and reach new customers. **Valentin Khatchatourian, Director, Credit Suisse**
09:30 – 10:00	**Panel: Scaling up; What is the future of a digitalised wealth management institution?** • How embracing digital tools can aid in the future of wealth management. • Understanding the opportunities and challenges within digital integration in wealth management. • Identifying how digitisation can contribute to the future of wealth management. Chair: Benjamin Hatton **Christos Kontos, CEO, ELIA Investment Advisors** **Uraitz de Julian Garate, Head Digital Investment Applications, Coutts** **Ludwig Holle, Managing Director, FINAplus**

10:00 – 10:30	**Generative AI: Transformation Opportunities in Wealth Management**
	• The current generative AI landscape and future outlook.
	• Navigating generative AI for wealth management:
	  - Outlook and implications
	  - Risks and challenges
	  - Regulation
	
	Suneet Muru, Thematic Analyst in the Thematic Intelligence team, GlobalData

10:30 – 11:00	**Innovating for Success: VP Bank's Partnership with InvestCloud to unlock the power of a digital ecosystem** **Christine Ciriani, Chief Revenue Officer, International and General Manager, APAC, Invest Cloud** **Dr. Urs Monstein, Chief Operating Officer, VP Bank**
11:00 – 11:30	**Morning Refreshments and Networking**
11:30 – 12:00	**Engaging the ages: Educating on a digital level** • Understand the factors contributing to the growing popularity of digital assets, and how it can benefit your clients. • Address the knowledge gap among the older generation and the next gen. • Identify methods to build trust and confidence with your clients in a digital world.

	Uraitz de Julian Garate, Head Digital Investment Applications, Coutts
12:00 – 12:30	**Building Trust through Video Communication in the Financial World – is that possible?** • The importance of trust in digital finance and the challenges posed by digital transformation. • Video communication as a tool for building trust? • Best Practices and Success Stories. **Dr. Sven Damberger, Managing Director at MVC Mobile VideoCommunication GmbH** **Thomas Gonfray, Head of Sales Switzerland at Pexip AS**
12:30 – 13:00	**Panel: Wealth Empowerment: The Financial Potential of Women as clients** • Learn how women's wealth is impacting the dynamics in wealth management. • Discuss the ethical and conservative nature of female investing. • What are their digital needs? Chair: Stela Willemstein, Senior Business Risk Officer, UBS **Anna Szkudlarek, Partner, Head of Product, KENDRIS** **Aliya Das Gupta, Senior Vice President of Business Development, Sygnum Bank** **Carolina Thomaz, Chief Risk Officer, Itaú**
13:00 – 13:30	**Operationalizing Compliance for Wealth: Enabling Client Advisors to Take the Next Right Action** • How can wealth managers meet increasingly complex compliance needs while maintaining a seamless client experience? • Learn how the right technology can simplify the advisor workflow and augment client service through real-time decision-making and automated controls. • Boost business profitability while simultaneously reducing operational risk profiles. • Ensure all decisions are easily auditable, traceable, and transparent. • Enabling advisors to compliantly provide the right products at the right time. **Craig Butterwork, Chief Commercial Officer, Droit**
13:30 – 14:30	**Lunch and Networking**
14:30 – 15:00	**Working with third parties is key – choosing your right partners in terms of data protection** • Learn how to assess third party digital services; are they the right ones for you? • Take steps to ensure data safety within your organisation. **Carolina Thomaz, Chief Risk Officer, Itaú**
15:00 – 15:30	**Private Banking during the rise of AI - what role will the human voice and perspective play in times of artificial intelligence and digitalization** • AI - enabler or threat for private banking? • How is digitalization influencing our business? • Why we do HUMAN Private Banking? **Dr. Dominik Helberger, Head of Private Banking International, Bergos AG**
15:30 – 16:00	**Panel: Finding the perfect match: Navigating how to find the right service provider** • Building confidence and creating value for clients' individual needs. • Advice from real service providers. • What to look for, and what to ask? Chair: Benjamin Hatton

	Christos Kontos, CEO, ELIA Investment Advisors **Dr. Eric Bade, Head Business Transformation & Integration - Executive Director, Sygnum Bank**
16:00-16:05	Closing remarks
16:05	**Conference Close**