ARENA
INTERNATIONAL EVENTS GROUP

DIGITAL INTEGRATION IN WEALTH MANAGEMENT USA

Miami, USA

26th – 27th September 2023

The Digital Integration in Wealth Management USA Conference brings together digital leaders from private banks and wealth management firms to provide a strategic roadmap for integrating digital tools into your offering.

Key Speakers:

- Mayor of Miami Beach Dan Gelber
- Steven Blitz, Chief US Economist, TS Lombard
- Rashmi Badwe, Chief Operating Officer, TIAA
- Mohamad Merilan, Director, UBS
- Angela Kahrmann, Head of Regulatory Supervision & Wealth Business Enablement, TIAA
- Eugene Karl Montoya, Board Director, Climate Resilience & Blue Finance Lead, Waterfront Alliance
- Brad Swineheart, Chief Marketing Officer, Oxford Advisory Group
- Husain Rangwalla, Group Operations Director, Skybound Wealth Management
- Niladri “Neel” Mukherjee, Chief Investment Officer, TIAA
- Mary Deatherage, Retired Managing Director Private Wealth Advisor, Morgan Stanley
- Christian E. Urbina, CFP®, President/CIO, Prosperitus Wealth Advisors
- Franz Hochstrasser, CEO, Raise Green
- Maxime Krief, Vice President of Strategic Solutions, Amuni Financial
- Michael Petagna, President and CEO, Amuni Financial

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DIGITAL INTEGRATION IN WEALTH MANAGEMENT USA

26TH - 27TH SEPTEMBER 2023 | MIAMI, USA

DAY ONE - Tuesday 26th of September

08:00: **Registration & Refreshments**

08:45: **Chairs opening remarks**
Bartosz Golba, Research Director – Financial Services, GlobalData

9:00: **Keynote Address**
Hybrid, hyper-personalization, and holistic services: Bringing the best of both worlds together

- Adopting a client-centric culture and supercharging processes for greater compliance
- Diversifying communications channels and customizing approaches to meet the unique needs of each client demographic
- Advancing client retention through a seamless and personlised digital process
- Implementing an enterprise-wide customer relationship management (CRM) system

Husain Rangwalla, Group Operations Director, Skybound Wealth Management

9:30: **Streamlining client business interactions in wealth**

- Rethink today's costly, inefficient, and fragmented client interaction model requiring significant manual intervention
- Extend your existing client business processes across onboarding, servicing, with digital interaction workspaces
- Provide a private, personalized, and modern client experience and increase retention
- Manage client account control – with a complete audit trail, roles, and seamless transfer of account interactions across staff
- Coordinate with your customers, partners, and teams to achieve joint deliverables, hit milestones, gather approvals, and more

Lead Partner: *Shimona Pinto, Senior Corporate Solutions, Moxo*

10:00: **Fostering firm growth through teams, technology, and talent**

- Putting a focus on leadership strategies to enhance the overall success
- Finding the right balance between remote and in person employee communication
- Presenting examples of effective technology integration across investment banking and Fintech

Mohamad Merilan, Director, UBS

10:30: **The future of digital onboarding: What does 'Good' really look like?**
Wealth Dynamix are leading providers of Client Lifecycle Management solutions to some of the best known names in wealth management and private banking. In this presentation we will explore the future of onboarding and explain:

- Why there is no room for a 'one-size fits all' approach to successful customer onboarding
- How optimising onboarding journeys based on customer segments can lead to a more profitable business
- The technologies required to deliver future-proof onboarding in a cost-effective fashion

***Gold Partner**: Steve D'Souza, Sales Manager – USA, UK, MEA, & Scandinavia, Wealth Dynamix*

11:00: **Morning refreshments and networking**

11:30: PANEL DISCUSSION: **Navigating the changing wealth landscape: What are the biggest threats and opportunities on the horizon?**

- Looking towards the future of wealth management
- Understanding key trends affecting business and investment for 2023 and beyond
- What is the next generation of wealth-disrupting technology?
- How can businesses adjust to emerging global uncertainties?

Rashmi Badwe, Wealth Management Chief Operating Officer, TIAA
Shimona Pinto, Senior Corporate Solutions, Moxo
Husain Rangwalla, Group Operations Director, Skybound Wealth Management
Moderator: Bartosz Golba, Financial Services - Research Director, GlobalData

12:15: **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

12:45: **Lunch and networking**

14:00: **Make way for new generations: Engaging young investors**

- Exploring next-gen investment initiatives; what tech should be the focal point?
- Looking towards value-driven investing, diversity and inclusion, ESG and activisms
- Generating new climate resilient investment opportunities
- Utilising tech to make investing more fun; how can we change clients' perceptions of investing?

Eugene Karl Montoya, Board Director, Climate Resilience & Blue Finance Lead, Waterfront Alliance
Franz Hochstrasser, CEO, Raise Green
Moderator: Mary Deatherage, Retired Managing Director Private Wealth Advisor, Morgan Stanley

14:45: **How Gen X, Y and Z Are disrupting wealth management?**

- How different generations of investors are changing their preferences and expectations when working with wealth management firms
- How banks are balancing traditional high-touch, "white glove" service with digital-first expectations, even for high-net worth clients
- How firms are making client onboarding much faster and friendlier, while reducing risk from data errors, by re-imagining data capture and integrating e-signatures
- When it makes sense to introduce humans into a digital process and what this looks like

Silver Partner *Brad McGeown, VP, Financial Services Strategy, Smart Communications*
Sameer Hajarnis, SVP & General Manager – Digital Agreements, OneSpan

15:15: **Harnessing the power of big data**

- Unleashing the power of data to understand the economic environment
- Utilizing 'big data' to analyze polices and capital market prices
- Exploring case studies

Steven Blitz, Chief US Economist, TS Lombard

15:45: **How modern digital customers inspire innovation**

- Following the COVID-19 pandemic, the past three years have dramatically altered how we work, leaving Wealth Management firms with tremendous pressure to innovate amid a challenging economic environment
- In this session, Yohan Lobo, Industry Solutions Manager, Financial Services at M-Files, will detail how modern digital consumers can inspire innovation in their wealth management client experiences by leveraging the power of AI
- Yohan will discuss the impacts of the Great Wealth Transfer and how to manage generational expectations, illustrating how automation improves decision-making processes and client relationships
- Additionally, attendees will walk away with a better understanding of the benefits of AI and how it will shape the future to drive productivity and collaboration

Silver Partner *Yohan Lobo, Industry Solution Manager, Financial Services - M-Files*

16:15: **Afternoon refreshments and networking**

16:45: **Scenarios for WM in 2030: A decade of disruption, and how to navigate it**

The presentation will review results of GlobalData's 19th annual Global Wealth Managers Survey, drawing out key insights for current and future market conditions, including:

- Fintech in the context of capital market trends and how they affect profitability
- Robo-advice, wider digitalization and impact on cybersecurity
- ESG and demographic shifts

Bartosz Golba, Financial Services - Research Director, GlobalData

17:15: **Chairs closing remarks**

17:20: **Drinks Reception**

18:20: **Dinner Partner** - **Private Bespoke Dinner Hosted by Smart Communications**

Changing the conversation in wealth: How to rethink digital-first client-advisor engagement

Within wealth management and private banking, organizations are leveling up their client facing communications, from new account opening and onboarding to servicing and reporting. How are you responding to the increased pressure from clients for high touch and hyper-personalized digital communications?

Brad McGeown, VP, Financial Services Strategy, Smart Communications

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DAY TWO - Wednesday 27th of September

08:00: **Registration & Refreshments**

08:50: **Chairs opening remarks**

Opening Remarks from the Mayor of Miami Beach Dan Gelber

09:00: **Keynote Address**

Marketing for high-net-worth individuals: The future of digitally motivated brand design

- Creating an authoritative and informative online presence through reliable content
- Establishing effective and appropriate means of collecting and analysing client data
- Influencing consumer behaviour and perception through branding

Brad Swineheart, Chief Marketing Officer, Oxford Advisory Group

09:30: **The power of digital integration: Enhancing the client experience**

- Overcoming key challenges in managing leads, compliance requirements and bond inventory management through tech and integrated systems
- Staying abreast with tech advancements to further streamline operations and client communication
- Exploring the future potential of AI and machine learning
- Using digital tools to further engage and personalise client experiences

Maxime Krief, Vice President of Strategic Solutions, Amuni Financial
Michael Petagna, President and CEO, Amuni Financial

10:00: **Morning refreshments and networking**

10:45: PANEL DISCUSSION: **Thriving through and beyond the current macro environment; Factors on financial assets and portfolios**

- Navigating the macro-economic outlook for the next 12 months
- Looking at the impacts on asset returns and risk-adjusted performance on diverse wealth portfolios
- Creating opportunity through change; rethinking operating models to re-energize growth and resilience
- How can we help private clients and wealthy families navigate the current markets?

Niladri "Neel" Mukherjee, Chief Investment Officer, TIAA
Moderator: Steven Blitz, Chief US Economist, TS Lombard
Husain Rangwalla, Group Operations Director, Skybound Wealth Management
Christian E. Urbina, CFP®, President/CIO, Prosperitus Wealth Advisors

11:30: **Q&A: Regulatory rundown: How will new changes affect how we operate and engage with clients?**

- Exploring the key industry regulation talking points including:
- Regulatory developments for digital assets and blockchain
- Systemic risk, market risk and liquidity risk
- Governance, resilience and substance
- Enhancing investor protection

Angela Kahrmann, Head of Regulatory Supervision & Wealth Business Enablement, TIAA

12:00: **Lunch and networking**

13:00: **Interactive roundtable discussions:**
Join us for an afternoon of interactive discussion and debate. This is your opportunity to select your area of interest and engage with fellow experts in the area.

- **Topic 1:** Pathing the way for personalization: Enhancing the client experience in a digital world
- **Topic 2:** How should digital asset investing products be delivered to wealth management clients?

14:00: **Close of conference**