ARENA
INTERNATIONAL EVENTS GROUP

8TH ANNUAL DIGITAL INTEGRATION IN WEALTH MANAGEMENT 2024

London, UK

19th – 20th March 2024

2024 Speakers:

Chair: Bartosz Golba, Research Director Financial Services, GlobalData
Chair: Suneet Muru, Analyst, GlobalData
Sahra Abdille, Director Digital Investing, Coutts
Celeste Leverton, Associate Director, Responsible Investing Manager, Coutts
Derek Shanks, Director Digital Investing and Wealth Management Technology, Barclays
Nina Manning, Partner Digital Product, Killik & Co
Tim Bennett, Head of Education, Killik & Co
Waseem Shah, Head Of Middle Office Technology, Vanguard Europe
Helen Russell-Hughes, Head of Digital Marketing, Charles Stanley
Mark Glover, Global Head of Financial Planning - Wealth Management, HSBC
Maria Costa Palazuelos, Head of Sustainability, Santander Wealth Management and Insurance
Kara K W Byun, Head of Fintech, Venture & Growth Investments, HSBC Asset Management
Dale Jones, Head of Data Insights, RBS International, NatWest Trustee & Depositary Services
Stephen Doyle, Head of Traditional Funds, RBS International, NatWest Trustee & Depositary Services
Andrew Bizzell, COO, Apollo Wealth - St James's Place
Umar Zaman, Head of Strategy, BNY Mellon Pershing EMEA
Carsten Heckemüller, Head of Global Channels, Process and Business Architecture and Agile Lead, Deutsche Bank

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2024 Speakers continued:

Iain Cowell, Global Head of Partnerships, Digital Solutions, Wealth Management, Franklin Templeton
Patrick Thomas, Head of ESG Portfolio Management, Canaccord Genuity Wealth Management
Ononuju Irukwu, Head of Private Banking, FirstBank UK
Nataliya Shybanova, Head of Partnerships, Green Wealth Partners
Suneet Muru, Analyst, GlobalData
Ronald Janssen, Managing Director Goal Based Planning, Ortec Finance
Dr Greg B Davies, Head of Behavioural Finance, Oxford Risk
Yohan Lobo, Industry Solution Manager, Financial Services, M-Files
Rene Maciag, Market Lead, UK , Additiv
Alessandro Tonchia, Head of Strategy, InvestCloud
Shimona Pinto, Senior Corporate Solutions, Moxo
Lennart Asshoff, Product Director, Backbase
Nikhil Kamdar, VP, Global Solution Consultancy, iProov
Chet Velani, Managing Director, EV
Annette Juengling, Senior Sales Manager, CREALOGIX
Marc Mettler, Head Business Development, 3rd-Eye Analytics

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DIGITAL INTEGRATION IN WEALTH MANAGEMENT 2024

19th - 20th March 2024 | LONDON, UK

Day 1 - Tuesday 19th March 2024

08:00	Registration
08:50	Chair Opening Remarks ***Bartosz Golba, Research Director Financial Services, GlobalData***
09:00	**Keynote: Using Digital Tools to Deliver Financial Planning at Scale** • How can digital tools increase access to financial planning services? • Can digital tools in financial planning close advice gap in the UK? • What strategies can be used to leverage the tools and deliver solutions at scale ***Mark Glover, Global Head of Financial Planning, HSBC Wealth Management***
09:30	**Streamline Your Client Business Processes** • Rethink today's costs, inefficiency and fragmented client interaction model requiring significant manual intervention • Providing private, personalised, modern client experience to increase efficiency and drive retention • Leveraging interaction workspaces to streamline client onboarding, account management and etc. • Overseeing client accounts with a complete audit trail, role management, and seamless transfer of account interactions across staff • Coordinating with your stakeholders to achieve joint deliverables, milestones, approvals, and etc. ***Shimona Pinto, Senior Corporate Solutions, Moxo***
10:00	**Fireside chat: Racing To Embracing Mass Affluent** • What are the market opportunities missed? • Using digital to get scale up serving of mass affluent • Tailoring underserved wants and needs: sustainability, faith based, mass customisation ***Kara K Byun, Head of Fintech, Ventures & Growth Investments, HSBC***

	Moderator: Mark Glover, Global Head of Financial Planning, HSBC Wealth Management
10:30	Gold Partner - Objectway
11:00	Networking break – visit exhibition hall

	STREAM A	STREAM B
	STREAM A ***Front End, Client Facing Tech*** ***Chair: Bartosz Golba, Research Director Financial Services, GlobalData***	**STREAM B** ***Back/Middle Office Integration*** ***Chair: Maria Costa Palazuelos, Head of Sustainability, Santander Wealth Management and Insurance***
11:30	**Panel Discussion:** **Harnessing The Power of Educating Clients for Better Communication** • Uncovering mismatch of client expectation and product realisation • Identifying the unsuccessful approaches of communication and its possible solutions • Highlighting risks of inconsistent communication • How can guiding clients on products and services improve the outcome of their investments? ***Sahra Abdille, Director Digital Investing, Coutts*** ***Alessandro Tonchia, Head of Strategy, InvestCloud*** ***Shimona Pinto, Senior Corporate Solutions, Moxo***	**Panel Discussion:** **Is Private Wealth Years Behind? Investigating Transformation from Paper to Digital** • What are the opportunities and risks in migrating physical data to online storage? • Finding an ethical balance by reducing paper and meeting sustainability goals • Investigating information security in data management. • Assessing seamless integration of digital reporting and to what extent ***Umar Zaman, Head of Strategy, BNY Mellon Pershing EMEA*** ***Andrew Bizzell, COO, Apollo Wealth - St James's Place*** ***Lennart Asshoff, Product Director, Backbase*** ***Chair: Maria Costa Palazuelos, Head of Sustainability, Santander Wealth Management and Insurance***

	Chair: Bartosz Golba, Research Director Financial Services, GlobalData	
12:00	**Out With The Old, In With The New: How Can We Understand and Integrate New Generational Clients?** • What do Gen Z know about private wealth and what can we understand? • Is instant digital accessibility highly requested in private banking from the younger generation? • Updating and tailoring services using digital tools to communicate with Gen Z – is it efficient? • How can improving media practices as social media and digital platforms, increase engagement and become a key for targeting client customisation? ***Nina Manning, Partner, Product Digital, Killik & Co***	**How Can Digital Tools And Experiences Help Customers To Make More Informed Decisions Around Investing Sustainably** • Defining the current digital tools used to educate customers • How are banks informing decisions on investing sustainably and is it successful? • Recognising the challenges of regulations and how it delays communication in wealth management ***Maria Costa Palazuelos, Head of Sustainability, Santander Wealth Management and Insurance***
12:30	**Client-Centric, Holistic Advice in The Consumer Duty Era** • From transactional-based advice to holistic financial coach: Why use a goals-based approach to determine the course? • How can you align risk profiling and financial planning in line with Consumer Duty and give a consistent and suitable advice? • How can technology in general and AI in specific be leveraged to provide more personalized advice?	**Organize, automate and de-risk information: Create more time for clients and get AI ready** • Why do we want structured organized information? • How do workflows create more time for clients? • What could AI do for your firm and how do we get ready? ***Yohan Lobo, Industry Solution Manager, Financial Services, M-Files***

	• How to increase efficiency in your advisory process? ***Ronald Janssen, Managing Director Goal Based Planning, Ortec Finance***	
13:00	Lunch break and networking	
14:00	**Panel Discussion:** **What Does *'Impactful Investing'* Truly Mean?** • How are we educating clients on their personalised services? • What services or tools are used providing to educate clients on investments and is it successful? • Grasping the meaning of 'Ethical' and balancing digital and physical investments • Questioning how 'Social' in ESGs are currently implemented and how this can be turned into key drivers. ***Kara K Byun, Head of Fintech, Ventures & Growth Investments, HSBC*** ***Celeste Leverton, Associate Director, Responsible Investing Manager, Coutts*** ***Nikhil Kamdar, VP, Global Solution Consultancy, iProov*** ***Chair: Suneet Muru, Analyst, GlobalData***	**Panel Discussion:** **Building on Portfolios to Improve Wealth Management** Available for Sponsor Panelist • How are we currently building portfolios and profiles? • Analysing the reasons of inefficient portfolio holdings and the solutions • Can we trust AI to risk profile, or is it a step too far? ***Dale Jones, Head of Data Insights, NatWest Trustee & Depositary Services*** ***Patrick Thomas, Head of ESG Portfolio Management, Canaccord Genuity Wealth Management*** ***Chair: Maria Costa Palazuelos, Head of Sustainability, Santander Wealth Management and Insurance***
14:30	**Unlocking Organic Growth Through Personalisation and Behavioural Finance**	Silver Partner - Workday

	• Help investors make better financial decisions through behavioural finance • Unlock a greater share of wallet and retention of assets under management through personalisation • Increase engagement and improve client experience with behavioural finance • Meet compliance and regulatory requirements • Achieve 10%+ organic revenue growth ***Dr Greg B Davies, Head of Behavioural Finance, Oxford Risk***	
15:00	**Fireside Chat: Embracing the personalisation revolution in Wealth Management** • How are digital tools personalising language to deliver customer needs? • Diversifying portfolios using data to meet client standards • Using onboarding as an approach to customer personalisation. • Are wealth banks balancing the digital and physical personalised services to all clients? ***Sahra Abdille, Director Digital Investing, Coutts*** ***Rene Maciag, Market Lead, UK, Additiv*** ***Chair: Suneet Muru, Analyst, GlobalData***	**Fireside Chat: Emerging Trends and Technologies in Wealth Management** • Witnessing a convergence of various trends including digital proliferation, globalization, AI-driven advice, and integration of banking with wealth management services. • Adopting new technologies, such as AI and machine learning, for better personalized advice, bankable/non bankable wealth overview and monitoring, integration of sustainable investments, as well as efficient operations • Exploring growth and opportunities to accelerate profits and investments ***Nataliya Shybanova, Head of Partnerships, Green Wealth Partners***

		Chair: Maria Costa Palazuelos, Head of Sustainability, Santander Wealth Management and Insurance
15:30	Silver Partner – Flanks	Silver Partner - Seismic
16:00	Networking break – visit exhibition hall	
16:30	**Driving Wealth Management Growth And Profitability With Client-Centric Innovation** • Highlighting diversity of client decision-making processes for selecting and staying with a wealth manager • Exploring the progress of wealth management transformation and how few innovations have met the unique needs of clients in this context • Discussing examples of client-centric innovations that effectively address these needs, leading to significant improvements in client acquisition and revenue growth ***Marc Mettler, Head Business Development, 3rd-Eye Analytics***	
17:00	**The New Future: Entering An Era of Product Engagement in AI Within Private Banking** • Driving user adoption • Personalisation in wealth management • Blockchain technologies and tokenisation unleash product design ***Iain Cowell, Global Head of Partnerships, Digital Solutions, Wealth Management, Franklin Templeton***	
17:30	**Cloud-Based Face Biometrics for Frictionless, Secure Client Onboarding and Authentication** • Discussing how face biometric verification, as an inherence factor in MFA, accelerates Know Your Customer (KYC) processes and fortifies Anti-Money Laundering (AML) efforts • Overcoming challenges in Wealth, focusing on expensive and insecure video identification and manual onboarding processes • Addressing authentication issues, particularly rising threats of Account Takeover Fraud (ATO), at points of account recovery or high-risk transactions • Elevating customer satisfaction and loyalty with streamlined, consistent digital access, fostering retention and expanding cross-selling potential • Gain insights from iProov's real-world applications in Wealth Management:	

	- Why UBS elevated operational efficiency and user convenience by replacing insecure and cumbersome video call verification methods - Why LGT introduced an advanced remote onboarding option for existing customers, prioritizing security and full compliance with European Banking Authority (EBA) regulations ***Nikhil Kamdar, VP, Global Solution Consultancy, iProov***
18:00	Drinks reception
19:00	Vendor Dinner Dinner (Available for Sponsorship) Within wealth management and private banking, organisations are levelling 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-personalised digital communications? Join us for dinner to discuss with your peer

Day 2 - Wednesday 20th March 2024

08:00	Registration
08:00	Breakfast Briefing - Moxo
08:50	Chair’s opening remark ***Bartosz Golba, Research Director Financial Services, GlobalData***
09:00	**Keynote Panel Discussion: Taking The Next Technological Step In Wealth Management** • How are banks replacing old data technologies in wealth management and what are the current challenges? • Are AI and Cloud replacing old technologies or assisting performance? • What scope is there for digital assets and will it be a new age in wealth? • Does consumer duty toughen the ability to become technological advance in wealth management? ***Waseem Shah, Head of Middle Office Technology, Vanguard Europe*** ***Colin Blackwell, Co-founder and Director, Hyperion Fintech*** ***Derek Shanks, Director Digital Investing and Wealth Management Technology, Barclays*** ***Yohan Lobo, Industry Solution Manager, Financial Services, M-Files*** ***Chair: Bartosz Golba, Research Director Financial Services, GlobalData***
09:30	Gold Partner – Invest Cloud
10:00	**Omnichannelling Across Wealth Management** • What is driving the adoption of Omnichannel? • Key considerations to delivering an effective Omnichannel experience: human and technology ecosystem • To what extent are the benefits of omnichannel reflected within the wealth management industry? • Defining seamless and effortless high-quality and how omnichannel is the new way of working

	Umar Zaman, Head of Strategy, BNY Mellon Pershing EMEA	
10:30	Networking break – visit exhibition hall	
	STREAM A ***Front End, Client Facing Tech*** ***Chair: Bartosz Golba, Research Director Financial Services, GlobalData***	**STREAM B** ***Back/Middle Office Integration*** ***Chair: Suneet Muru, Analyst, GlobalData***
11:00	**Can Loyalty Really Bring Royalty? Protecting Client Retention** • Understanding your clients, their needs, and behaviours. How can you use data and technology to create personalised customer experiences. • What is the target client experience in the wealth management industry? • How can client loyalty drive your revenue? ***Helen Russell-Hughes, Head of Digital Marketing, Charles Stanley***	**Digital Solutions to support increased Wealth Management Governance** • Utilising Digital to develop bespoke wealth management solutions • The increased regulatory expectations on Wealth Managers • Data insights to transform governance into a continuous assurance model • AI accelerating predictive analytics • Governance and oversight of digital asset portfolios • ESG Monitoring – game changer or white elephant? ***Dale Jones, Head of Data Insights, NatWest Trustee & Depositary Services*** ***Stephen Doyle, Head of Traditional Funds, NatWest Trustee & Depositary Services***
11:30	**Why Digital and Hybrid Advice Is No Longer a Futuristic Concept** • Understand differences between digital and hybrid advice vs traditional financial planning methods • Learning how to turn digital revolution into an evolution	Silver Partner Available

	• Exploring practical digital and hybrid adoptions tailored to sector, size and market segment • Achieving efficiency, productivity and consistency with a market leading implementation centered around customers ***Chet Velani, Managing Director, EV***	
12:00	**Exploring The True Mask of UHNW Clients** • Understanding strategy and relationships in operating within UHNWI clients • Maintaining the balance of rapid income and high monitorisations • Improving digital behaviour techniques in reporting and data management for UHNW • How are banks in WM preventing fraud and scam targeting and what is currently implemented?	**How Financial Education Underpins Wealth Management In Both Our Digital And Non-Digital Worlds** • What do we mean by financial education and why do we offer it? • The importance of digital and physical "Chinese walls" • What common behaviours, biases and mistakes are we trying to educate our clients about? • How do we deliver education now – and what does the future look like? ***Tim Bennett, Head of Education, Killik & Co***
12:30	**What's driving your digital strategy?** • Digital strategy for wealth management • The role of the client in digital strategy • Integration with strategic and commercial goals • Demographic trends increasing the urgency of digitalisation • Turning a digital strategy into tactical actions ***Annette Juengling, Senior Sales Manager, CREALOGIX***	Tech Spotlight Partner - WealthOS

12:45	Lunch break and networking
13:45	**Re-Imagining Digital Experience For WM Clients** • What drives digital satisfaction for WM clients? • What trends emerge in the WM industry? • How do those drivers and trends impact the client journeys? ***Carsten Heckemüller, Head of Global Channels, Process and Business Architecture and Agile Lead, Deutsche Bank***
14:15	Silver Partner - Pricehubble
14:45	Networking break & Prize draw – visit exhibition hall
15:15	**Generative AI: Transformation Opportunities in Wealth Management** • The current generative AI landscape • Navigating generative AI for wealth management: - Outlook and implications - Risks and challenges - Regulation ***Suneet Muru, Analyst, GlobalData***
15:45	**Destroying The Iron Wall: Breaking Cultural Barriers In WM** • Improving translation to clients • Adopting new ways of language/communication styles to multicultural backgrounds • Unmasking behaviours and utilising the different cultures in data analytics to personalise services and language • How are banks currently tackling the issue of cultural barriers and what technology is being used to prevent it? ***Ononuju Irukwu, Head of Private Banking, FirstBank UK***
16:15	Close of Conference