

# DIGITAL INTEGRATION IN WEALTH MANAGEMENT 2018



The only event to focus on integration of digital capabilities with existing processes to enhance client engagement and reach new segments

## 2018 Speakers Include

- James Dunne**, Head of Digital Investment, **Santander**  
**Vidur Varma**, Product Director - UK Consumer Bank & International Personal Banking EMEA, **Citi**  
**Tina Cracknell**, Head of Digital Marketing, **UBS Wealth Management**  
**Sasha Dabliz**, Marketing Director, **Rothschild & Co. Wealth Management**  
**Dominic Traynor**, Head of Digital, **M&G Investments**  
**John Barrass**, Deputy Chief Executive, **Personal Investment Management and Financial Advice Association (PIMFA)**  
**Thierry Derungs**, Chief Digital Officer, **BNP Paribas Fortis**  
**Gareth Johnson**, Divisional Director - Head of Digital Channels and Investment Services, **Brewin Dolphin**  
**Daniel Hernandez**, EMC Head E-Connectivity Solutions, **Commerzbank AG**  
**Simon Kingsnorth**, Global Head of Global Head of Digital Marketing, **Citi Private Bank**  
**Bartosz Global**, Head of Wealth Management, **GlobalData**  
**Kirsten Burt**, Head of Marketing, UK WM & UBS Smart Wealth, **UBS Wealth Management**  
**Tiziana Lamberti**, Head of Brand, Advertising, Consumer & Digital Marketing, **Generali**  
**Rob Hudson**, Head of Digital Distribution, **Aberdeen Standard Asset Management**  
**Philipp Zerhusen**, Director Market Development, **FactSet Digital Solutions GmbH**  
**Vincent Denoiseux**, Head of Quantitative Strategy, **Deutsche Bank**  
**Sabrina Del Prete**, Digital Transformation Director, **Williams & Glyn, RBS**  
**Sam Halliday**, VP – Digital, **Barclays Wealth Management**

### Gold Partners



### Silver Partner



### Panel Partner



### Technology Spotlight Partners



### Partners

# DIGITAL INTEGRATION IN WEALTH MANAGEMENT 2018



	<b>Digital Integration in Wealth Management</b> <b>Wednesday 21<sup>st</sup> February 2018</b> <b>Programme Day One</b>
07:30	Registration and refreshments
08:20	Chair's opening remarks
08:30	<p><b>Uncovering Wealth Management client insight to assess innovative digital opportunities to capitalise upon</b></p> <ul style="list-style-type: none"> <li>Assessing digital movements made by the Wealth Management over the past year to illustrate incremental growth and further potential</li> <li>Uncovering the Mass Affluent and changing generation market to highlight increasing needs for digitalisation to ensure their engagement and retention</li> <li>Exploring the impacts of GDPR to depict technological that will aid continuous growth against these challenges</li> <li>Evaluating digitalisation to assess new technology innovations to capitalise upon</li> <li>Examining future trends to illustrate how a fully integrated digital strategy will increase operational efficiency and cut costs</li> </ul> <p><b>Bartosz Golba, Head of Wealth Management, GlobalData</b></p>
09:00	<b>Session Reserved for Lead Partner</b>
09:30	<p><b>Digital Engagement: Underpinning digital techniques to both attract and better engage your client base</b></p> <ul style="list-style-type: none"> <li>Evaluating how to fully integrate digital into your strategy to ensure top digital experiences to attract the mass affluent</li> <li>Assessing how digitalisation can enhance consumer experience to ensure client retention</li> <li>Illustrating how collaboration across functions within organisations will maximise digital potential to provide momentum for moving into evolving technology spaces</li> <li>Unveiling how online marketing is used to create leads in order to generate a greater consumer base to remain competitive</li> <li>Unveiling how and if the mass affluent is a target segment for you to tap into to increase your market share</li> </ul> <p><b>Thierry Derungs, Chief Digital Officer, BNP Paribas Fortis</b></p>
10:00	<p><b>Session for Moxtra (Gold Partner)</b></p> 
10:30	Morning refreshments and networking
11:00	<p><b>Unlocking the Mass Affluent to create an appreciation for further integrated digitalisation strategies to lower costs and increase efficiencies</b></p> <ul style="list-style-type: none"> <li>Exploring the digital landscape to better examine younger generations inheriting wealth to match electronic solutions to their needs</li> <li>Generating an appreciation for trends of HNW to better understand growing needs of the Mass Affluent</li> <li>Outlining how Artificial Intelligence digitalisation will both effectively target new non-high network clients to mitigate human error and increase productivity</li> <li>Evaluating how to deliver an increasingly digital service compliantly to adhere to GDPR and lower operational costs</li> <li>Underpinning segmentation techniques to evaluate if the Mass Affluent are a future target and gateway</li> </ul>

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	<p>audience to help forecast future strategy</p> <p><b>Kirsten Burt, Head of Marketing, UK WM &amp; UBS Smart Wealth, UBS Wealth Management</b></p>
11:30	<p><b>Gold Partner</b></p> <p><b>Philipp Zerhusen, Director Market Development, FactSet Digital Solutions GmbH, Topic TBC</b> </p>
12:00	<p><b>Personalization: Obtaining an appropriate personal service in an increasingly digital world</b></p> <ul style="list-style-type: none"> <li>• Highlighting differing digital needs between HNW and Mass Affluent clients to underpin a cohesive digital strategy</li> <li>• Illustrating levels of required personalization between audience segments to assess best methods to create content</li> <li>• Evaluating various personalization strategies within digital channels to ensure personal contact meet client needs</li> <li>• Assessing segment audience to forecast future needs of generational clientele to better prepare and retain customers</li> <li>• Exploring differing client segments to underpin digital communications that satisfy varying clientele</li> </ul>
12:30	<p><b>Session for Aixigo (Technology Spotlight Partner)</b> </p>
12:45	Lunch and networking
14:15	<p><b><u>Panel Discussion</u></b>  <b>Fully integrating Financial Services with Technology: Debating use of Robo Advisors to evaluate how best to serve your clientele</b></p> <ul style="list-style-type: none"> <li>• Investigating importance of continuous incremental growth within sector to depict innovation techniques that secure a competitive balance of digital and traditional methods to remain competitive</li> <li>• Exploring artificial intelligence to illustrate cheaper investment solutions to enable lower operating costs through changing business models</li> <li>• Assessing robo advice technology to highlight client management systems to assess streams that provide greater transparency to ensure retention of clientele</li> <li>• Determining the mechanics of robo to highlight more tailored digital experiences to provide an increasingly personal service</li> <li>• Debating efficiency gains through implementing robo to underpin key performance indicators</li> </ul> <p><b>Panellists:</b>  <b>Vidur Varma, Product Director – UK Consumer Bank &amp; International Personal Banking EMEA, Citi</b>  <b>Sabrina Del Prete, Digital Transformation Director, Williams &amp; Glyn, RBS</b></p> <p><b>Session for InvestCloud (Panel Partner)</b> </p>
14:45	<p><b><u>GDPR: Big Data, Big Problem</u></b></p> <p><b>Assessing strategies to both meet regulatory demands and maximize on information technology innovation</b></p>

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	<ul style="list-style-type: none"> <li>• Exploring new regulatory requirements to illustrate areas of opportunity and to clarify areas of uncertainty</li> <li>• Assessing how coherent digitalization across organizations will help mitigate high costs of GDPR</li> <li>• Illustrating company culture to assess stagnation and hindrances in digital movements within organizations to minimize its affect</li> <li>• Unveiling innovative technologies to manage efficient flows of data to clients to adhere effectively with regulations</li> <li>• Illustrating benchmarking techniques to assess how campaigns should be undertaken to ensure total compliance</li> <li>• Q&amp;A Session</li> </ul> <p><b>John Barrass, Deputy Chief Executive, Personal Investment Management and Financial Advice Association (PIMFA)</b></p>
15:15	<b>Session Reserved for Silver Partner</b>
15:45	<p><b>No one size fits all: Underpinning how to blend digitalisation with a fiscal service in Wealth Management to retain a personal service in dynamic advisory offering</b></p> <ul style="list-style-type: none"> <li>• Exploring choices in how to service clientele to evaluate an increasing need for a suitable balance</li> <li>• Creating an appreciation for digital support within a humanistic sector that compliment industry operations to increase efficiencies</li> <li>• Debating where the balance lies within high touch digital services without compromising HNW desires, as well as overall business needs</li> <li>• Illustrating how digital tools will enable the creation of relevant content to attract and secure clients</li> <li>• Assessing personal alignment within electronic services to highlight opportunities of tailored communications to maximise on 'push' channels</li> <li>• Investigating how technical innovation will internally enable lower cost and greater time efficiencies</li> </ul> <p><b>Simon Kingsnorth, Global Head of Digital Marketing, Citi Private Bank</b></p>
16:15	Afternoon refreshments and networking
16:45	<p><b>Assessing corporate culture to underpin impact on technology and digital innovation processes</b></p> <ul style="list-style-type: none"> <li>• Evaluating company culture difference to create an appreciation for the effects on implementation of digital processes</li> <li>• Illustrating strategies in which to get resistance work force on board with digital and different business practice</li> <li>• Establishing how digital and technology drives free thinking and innovation to evaluate their value within Wealth Management</li> <li>• Detailing lessons learnt when implementing changes in direction of business services to underpin best methods</li> </ul>
17:15	<p><b>Exploring needs for excellent content marketing to meet growing digital needs of growing clientele to ensure success</b></p> <ul style="list-style-type: none"> <li>• Assessing various needs of different segment audiences to evaluate the growing importance of effective digital content within Wealth Management</li> <li>• Highlighting arising issues if not best practised to underpin how to effectively implement digital content into data strategy, in order to target individuals in the correct manner</li> <li>• Deconstructing digital tracking tools to help evaluate performance of content delivered digitally to ensure effective communications</li> <li>• Illustrating effective means of online communications to underpin which channel to utilise with difference</li> </ul>

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	<p>audience segments to establish and enhance strong relationships</p> <ul style="list-style-type: none"> <li>• Debating whether content marketing should be used within Wealth Management to enhance branding</li> </ul> <p><b>Dominic Traynor, Head of Digital, M&amp;G Investments</b></p>
17:45	<p><b>Spotlight Case study: Exploring experiences with robo technology to assess how best to integrate digital channels into your business strategy</b></p> <ul style="list-style-type: none"> <li>• Highlighting audience segments to underpin differing needs of innovative distribution methods and remote meetings</li> <li>• Exploring assessable solutions and technology patterns of change to ensure competitive dynamism</li> <li>• Evaluating opportunities and benefits with self-service digital channels to illustrate operational efficiencies</li> <li>• Demonstrating client driving forces to explore distribution power</li> </ul>
18:15	Chair's summary and close of conference
18:15	Sponsored Drinks Reception

	<p><b>Digital Integration in Wealth Management</b>  <b>Thursday 22<sup>nd</sup> February 2018</b>  <b>Programme Day Two</b></p>
07:50	Registration and refreshments
08:25	Chair's opening remarks
08:30	<p><b>Evaluating how best to integrate Social Media into your overall digital strategy to maximise on technological landscape</b></p> <ul style="list-style-type: none"> <li>• Detailing drives of social media to forecast increasing need for Wealth Management to utilise these platforms to enable a competitive advantage</li> <li>• Evaluating social media to enhance your online presence to maximum client engagement and retention</li> <li>• Highlighting whether social media enables CRM and which platforms are best to utilise to provide a personal service within digital spaces</li> <li>• Illustrating how online portals will enable a greater understanding of clients' needs to ensure appropriate segmentation of audiences in line with personalisation</li> <li>• Uncovering big data to establish how best to manage and mine it within social media platforms to gain a greater understanding of you clients</li> </ul> <p><b>Tiziana Lamberti, Head of Brand, Advertising, Consumer &amp; Digital Marketing, Generali</b></p>
09:00	<p><b><u>Panel Discussion</u></b></p> <p><b>Evaluating implications of Brexit to attain a secure understanding of potential regulatory adherences and plausible futures to mitigate uncertainty</b></p> <ul style="list-style-type: none"> <li>• Exploring effects of a 'hard' and 'soft' Brexit upon UK WM firms to assess upcoming difficulties or potential instability</li> <li>• Unveiling likely laws to better understand challenges posed by Brexit to remain competitive</li> <li>• Assessing plausible effects of Brexit upon European WM firms with UK offices to determine subsequent</li> </ul>

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pressures to evaluate

- Highlighting implications placed management of clients to assess future business strategy
- Reviewing future needs such as subsidiaries, mergers or acquisitions, to pinpoint upcoming needs and business requirements to stay competitive

**Panelists:**

**Vidur Varma, Product Director – UK Consumer Bank & International Personal Banking EMEA, Citi**

**Rob Hudson, Head of Digital Distribution, Aberdeen Standard Asset Management**

**John Barrass, Deputy Chief Executive, Personal Investment Management and Financial Advice Association (PIMFA)**

**Session Reserved for Panel Partner**

09:45

Session for Codehouse (Silver Partner)



10:15

**Assessing digital strategies that establish end-user confidence to ensure trust and retention of clients to sustain competitive advantage**

- Assessing differing desires for 'human' interaction within target segments to establish a common need for increasing clarity and technology sophistication across digital platforms
- Highlighting how a more 'human' interaction can be achieved through digital streams to ensure client trust and retention
- Deconstructing integrated methods of communication that offer absolute transparency and simplicity to attain that trust
- Illustrating digital tools that provide opportunities for clear and straightforward communication methods to gain a strong confidence from end users
- Underpinning digital audience segmentation techniques to highlight best practices to retain senior and long-lasting clients

**James Dunne, Head of Digital Investment, Santander**

10:45

Session for Nexj Systems (Technology Spotlight Partner)



11:00

Morning refreshments and networking

11:45

**Agenda Highlight**

**Clarifying regulatory confusion over Social Media to understand its limits to assess how best implemented into digital strategy to sustain a competitive advantage**

- Exploring regulatory requirements to assess challenges faced by WM
- Evaluating potential for different platforms within WM to assess opportunities in which to capitalise upon
- Illustrating transaction potential on social media to underpin compliance to assess how far it should be implemented within strategy
- Forecasting the digital landscape to discuss likelihood of a single channel platform for all facets of civilisation
- Underpinning consumer usage on social media to highlight optimum end user experience on various platforms to ensure first-rate communication standards

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	<p><b>John Barrass, Deputy Chief Executive, Personal Investment Management and Financial Advice Association (PIMFA)</b></p>
12:15	<p><b>Illustrating how to utilise Social Media platforms to substitute face-to-face propositions to assess opportunities</b></p> <ul style="list-style-type: none"> <li>• Evaluating how Social Media has changed the landscape to underpin opportunities to capitalise upon</li> <li>• Exploring varying needs of Social Media platforms between segment audiences to highlight key areas of potential to remain competitive</li> <li>• Assessing demands for quick and smooth contact can be met through social media channels to enhance client satisfaction</li> <li>• Highlighting how social media platforms within digital strategy could lower costs to become more competitive</li> <li>• Reviewing key regulations placed upon social media to assess its limitations to illustrate how it's best implemented coherently within a digital strategy</li> </ul> <p><b>Tina Cracknell, Head of Digital Marketing, UBS Wealth Management</b></p>
12:45	<p><b>Session Reserved for Silver Partner</b></p>
13:15	<p><b>CRM Take One: Illustrating how collection of client intelligence will secure you a competitive advantage</b></p> <ul style="list-style-type: none"> <li>• Assessing how CRM profiling tools can be integrated to capture key client information to provide deep and holistic views of clientele to depict their needs</li> <li>• Detailing CRM as client intelligence within a systematic process woven into every interaction to assess needs at all stages to retain customer base</li> <li>• Explore CRM querying tools to illustrate how it segments data into meaningful groups to enable behavioral targeting to ensure personalized content to maintain strong relationships</li> <li>• Highlighting how CRM allows businesses to handle the demands of client's digital needs through seamless software systems to engage them further and reduce organizational costs</li> <li>• Illustrating social media within CRM to ensure optimal client engagement to build brand awareness and ensure client retention</li> </ul> <p><b>Gareth Johnson, Divisional Director - Head of Digital Channels and Investment Services, Brewin Dolphin</b></p>
13:45	<p>Lunch and networking</p>
14:15	<p><b>The next digital disruption: Exploring the role of EFT within Wealth Management to underpin areas to capitalise upon</b></p> <ul style="list-style-type: none"> <li>• Discussing expansion and popularity of ETF within markets and portfolios to assess disruption upon industry and positioning of EFT within digital strategy</li> <li>• Highlighting EFT to evaluate effects on discretionary portfolios</li> <li>• Illustrating benefits on contracting profits to fulfil digital offering of a wealth manager</li> <li>• Exploring connections with robo platforms to establish if EFT could be a solution</li> <li>• Evaluating digital challenges with EFT to establish difficulties that should be confronted</li> </ul> <p><b>Jasdeep Hansra, Associate Director, Deutsche Asset Management</b></p>
14:45	<p><b>The Millennial Pull: Assessing growing markets to evaluate increasing desires for digital to enable convenience and forecast prospective needs</b></p>

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	<ul style="list-style-type: none"> <li>• Illustrating contrasting expectations between successful entrepreneurs to those with inherited wealth to determine demands</li> <li>• Assessing millennial's increasing need for ease and convenience to ensure a seamless service offering</li> <li>• Exploring likelihood of future technology drivers to estimate forthcoming innovation requirements and conditions from clientele</li> <li>• Discussing increasing technology use from senior clients in their advanced years to assess further technology drivers to underpin digital integration in WM</li> <li>• Underpin if millennial clientele will compliment or confuse your overall business strategy to gain a competitive advantage</li> </ul> <p><b>Daniel Hernandez, EMC Head E-Connectivity Solutions, Commerzbank AG</b></p>
15:15	Afternoon refreshments and networking
15:45	<p><b>Speaker Hosted Roundtables</b></p> <p>Interactive roundtable sessions offer a unique opportunity to come together with your peers to share best practice and develop solutions to critical challenges facing the industry as a whole. Hosted by industry experts and each focused on a single issue, roundtables are an exciting, interactive way to build your personal network and learn from the experience and expertise of others.</p> <p>Each roundtable session lasts for 45 minutes, and delegates may attend up to 2 roundtables</p>
Roundtable 1	<p>Evaluating how best to use content as a strategic marketing tool to both engage and retain clients</p> <p><b>Vidur Varma, Product Director - UK Consumer Bank &amp; International Personal Banking EMEA, Citi</b></p>
Roundtable 2	<p>Investigating technology developments within user experiences to assess where further digital tools can be integrated that will add real value to customer base</p> <p><b>Rob Hudson, Head of Digital Distribution, Aberdeen Standard Asset Management</b></p>
Roundtable 3	<p>Assessing potential damages to brand caused through targeting a new audience segments</p> <p><b>Sasha Dabliz, Marketing Director, Rothschild &amp; Co. Wealth Management</b></p>
Roundtable 4	<p><b>Content TBC</b></p> <p><b>Philipp Zerhusen, Director Market Development, FactSet Digital Solutions GmbH</b></p>
17:15	Chair's summary and close of conference