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 Wealth Management**
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 Golba, Head of Wealth Management, **GlobalData**
Kirsten Burt, Head of Marketing, UK & Jersey, **UBS Wealth Management**
Gian Franco Baldinotti, Head of Marketing**, Generali**
Rob Hudson, Head of Digital Distribution, **Aberdeen Standard Asset Management**
Jasdeep Hansra, UK Distribution, **Deutsche Asset Management**
Philipp Zerhusen, Director Market Development, FactSet Digital Solutions GmbH
Sabrina Del Prete, formally Chief Digital Transformation Officer, **Williams & Glyn, RBS**
Adam French, Co-Founder & CEO**, Scalable Capital**
Will Bailey, EVP, Europe and Innovation, **InvestCloud**
Bryan Sachdeva, VP of Wealth Management Solutions, **NexJ Systems**
Matthew Tilbury, Director, **Codehouse**
Mario Alves, Head of Sales and Partner Management, **aixigo AG**
Jennifer Hansen, Executive Vice President, Head of Global Sales Strategy & Execution, **Saxo Markets**
Oliver Williams, Head of WealthInsight, **GlobalData**
Jinendra Jain, Senior Product Management Director, **Moxtra**
Nikhita Iyar, Solutions & Strategic Alliances Director, **Moxtra**

07:30	Registration and refreshments
08:20	Chair's opening remarks
08:30	**Uncovering Wealth Management client insight to assess innovative digital opportunities to capitalise upon** • Assessing digital movements made by the Wealth Management over the past year to illustrate incremental growth and further potential • Uncovering the Mass Affluent and changing generation market to highlight increasing needs for digitalisation to ensure their engagement and retention • Evaluating digitalisation to assess new technology innovations to capitalise upon • Examining future trends to illustrate how a fully integrated digital strategy will increase operational efficiency and cut costs **Bartosz Golba, Head of Wealth Management, GlobalData**
09:00	**Digital Engagement: Underpinning digital techniques to both attract and better engage your client base** • Evaluating how to fully integrate digital into your strategy to ensure top digital experiences to attract the mass affluent • Assessing how digitalisation can enhance consumer experience to ensure client retention • Illustrating how collaboration across functions within organisations will maximise digital potential to provide momentum for moving into evolving technology spaces • Unveiling how online marketing is used to create leads in order to generate a greater consumer base to remain competitive • Unveiling how and if the mass affluent is a target segment for you to tap into to increase your market share **Thierry Derungs, Chief Digital Officer, BNP Paribas Fortis**
9:30	**Embedded Collaboration for Client Engagement in Wealth Management** • Exploring the current wealth management industry landscape to underpin need for more sophisticated platforms • Illustrating how Moxtra's intuitive, custom tailored solutions for omni-channel client engagement digitally transform the wealth management experience for the mobile era • Case Study: Citi hello o A Citibank experience for CitiGold India customers, powered by Moxtra. Citibank reimagined their client engagement journey with Moxtra, and redefined the way their customers bank with Citi Hello **Nikhita Iyar, Solutions & Strategic Alliances Director, Moxtra**
10:00	Morning refreshments and networking

10:30	**Assessing how targeting new audience segments could impact corporate branding**
	
	• Q&A session with Chair that discusses:
	  o Challenges associated with branding and reputation when targeting new client segments
	  o Highlighting best practices that will mitigate the damage to branding
	• Q&A session with the audience
	
	Sasha Dabliz, Marketing Director, Rothschild & Co. Wealth Management

11:00	**Applied Digitalization - Building a Superior Wealth Management Proposition** • Highlighting advances in technology to illustrate impacts across industries and specifically Wealth Management • Exploring innovation within the digital landscape to determine new tools and features appearing in increasingly short cycles • Embracing new technologies and processes within Wealth Management to underpin advantages that enable advisors to create a fully integrated and digital client experience • Digital components to streamline processes, provide premium client experience and asset allocation at reduced operating costs • Highlighting digital investment and wealth processes, from on-boarding to portfolio research and construction via re-balancing, surveillance and execution, to native HTML-based front-end tools and applications for clients and advisors **Philipp Zerhusen, Director Market Development, FactSet Digital Solutions GmbH**

11:30	**Content Marketing: Obtaining an appropriate personal content in an increasingly digital world** • Highlighting differing digital needs between HNW and Mass Affluent clients to underpin a cohesive digital content strategy • Illustrating methods of assessing interests between audience segments to create the best content • Evaluating various strategies within digital channels to ensure content meet client needs • Assessing HNWs segment audience to forecast future needs of next- gen clientele to better prepare engaging content • Exploring differing client segments to underpin digital communications that satisfy varying clientele - ie women and Millennials. **Kirsten Burt, Head of Marketing, UK & Jersey, UBS Wealth Management**
12:00	**Digital Portfolio Management: Technology for robo and personal advice** • Discussion incumbent entry into digital wealth management to underpin competition and increased efficiency • Highlighting our Digital Financial Portfolio Management Backoffice to illustrate it's regulatory savviness • Evaluating how to build your robo advisor on our specialised and trustworthy technology, that delivers top customer experience and successful asset management • Exploring benefits: From analyzing portfolios, managing assets to our very special „building bricks" and a great variety of basic portfolios • Discussing aixigos Digital Portfolio Management Backoffice and how it will manage hundreds of thousands portfolios your way, with just a handful of people, profiting from unrivaled efficiency and flexibility **Mario Alves, Head of Sales and Partner Management, aixigo AG**
12:30	Lunch and networking
13:30	<u>**Panel Discussion**</u> **Fully integrating Financial Services with Technology: Debating use of Robo Advisors to evaluate how best to serve your clientele** • 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 • Exploring artificial intelligence to illustrate cheaper investment solutions to enable lower operating costs through changing business models • Assessing robo advice technology to highlight client management systems to assess streams that provide greater transparency to ensure retention of clientele • Determining the mechanics of robo to highlight more tailored digital experiences to provide an increasingly personal service • Debating efficiency gains through implementing robo to underpin key performance indicators **Panellists:** **Sabrina Del Prete, formally Chief Digital Transformation Officer, Williams & Glyn, RBS** **Will Bailey, EVP, Europe and Innovation**, **InvestCloud** **Gareth Johnson, Divisional Director - Head of Digital Channels and Investment Services, Brewin Dolphin** **Rob Hudson, Head of Digital Distribution, Aberdeen Standard Asset Management** **Adam French, Co-Founder & CEO, Scalable Capital**
14:15	**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** • Exploring choices in how to service clientele to evaluate an increasing need for a suitable balance • Creating an appreciation for digital support within a humanistic sector that compliment industry operations to increase efficiencies • Debating where the balance lies within high touch digital services without compromising HNW desires, as well

	as overall business needs • Illustrating how digital tools will enable the creation of relevant content to attract and secure clients • Assessing personal alignment within electronic services to highlight opportunities of tailored communications to maximise on 'push' channels • Investigating how technical innovation will internally enable lower cost and greater time efficiencies **Simon Kingsnorth, Global Head of Digital Marketing, Citi Private Bank**
14:45	Afternoon refreshments and networking
15:15	**Exploring needs for excellent content marketing to meet growing digital needs of growing clientele to ensure success** • Assessing various needs of different segment audiences to evaluate the growing importance of effective digital content within Wealth Management • 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 • Deconstructing digital tracking tools to help evaluate performance of content delivered digitally to ensure effective communications • Illustrating effective means of online communications to underpin which channel to utilise with difference audience segments to establish and enhance strong relationships • Debating whether content marketing should be used within Wealth Management to enhance branding **Dominic Traynor, Head of Digital, M&G Investments**
15:45	**Disruption or Death: Leveraging Fintech to prepare and transform wealth management for the new age** • Is Artificial Intelligence a threat or an opportunity to augment wealth advisory • Evaluating how big data can help understand a client's true ability & willingness to take risks • Does IoT have the potential to deliver a better client experience on managing wealth • What can be learnt from gourmet cooking to deliver personalised content **Vidur Varma, Product Director - UK Consumer Bank & International Personal Banking EMEA, Citi**
16:15	**The future of Wealth Management: A threat to financial markets stability or a pioneer of a more efficient investment culture?** • Where are we on the digitisation advancement in terms of technology and acceptance? • What exactly are we digitising in the broad range of wealth management activities and where do we see the most benefits? • Digital advisory requires interdisciplinary expertise between financial engineering and financial planning. How confident are we? • How asset allocation decisions are made and are the portfolios really "optimised"? Could this really be leading to herding and systemic risk? **Jennifer Hansen, Executive Vice President, Head of Global Sales Strategy & Execution, Saxo Markets**
16:45	Chair's summary and close of conference
16:50	Sponsored Drinks Reception

	Digital Integration in Wealth Management **Thursday 22nd February 2018** **Programme Day Two**
08:30	Registration and refreshments
08:55	Chair's opening remarks
9:00	**Evaluating how best to integrate Social Media into your overall digital strategy to maximise on technological landscape** • Detailing drives of social media to forecast increasing need for Wealth Management to utilise these platforms to enable a competitive advantage • Evaluating social media to enhance your online presence to maximum client engagement and retention • Highlighting whether social media enables CRM and which platforms are best to utilise to provide a personal service within digital spaces • Illustrating how online portals will enable a greater understanding of clients' needs to ensure appropriate segmentation of audiences in line with personalisation • Uncovering big data to establish how best to manage and mine it within social media platforms to gain a greater understanding of you clients **Gian Franco Baldinotti, Marketing Director, Generali**
09:30	**Panel Discussion** **Evaluating implications of Brexit to attain a secure understanding of potential regulatory adherences and plausible futures to mitigate uncertainty** • Exploring effects of a 'hard' and 'soft' Brexit upon UK WM firms to assess upcoming difficulties or potential instability • Unveiling likely laws to better understand challenges posed by Brexit to remain competitive • Assessing plausible effects of Brexit upon European WM firms with UK offices to determine subsequent 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:** **John Barrass, Deputy Chief Executive, Personal Investment Management and Financial Advice Association (PIMFA)** **Sabrina Del Prete, formally Chief Digital Transformation Officer, Williams & Glyn, RBS** **Session Reserved for Panel Partner**
10:15	**10 Steps to Digital Success – A Practical Approach to Delivering Compelling Digital Experiences** • The marketing technology landscape today – the problem *and* the solution • Identifying business KPIs and your barriers to digital success • Why personalisation will be the customer experience differentiator in wealth management • Building a repeatable framework for delivering compelling online experiences that drive results **Matthew Tilbury, Director and Digital Experience Consultant, Codehouse**
10:45	Morning break and refreshments
11:15	**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
11:45	**Strategies for Enabling a Customer-First Digital Wealth Platform** • Exploring CRM to underpin when implemented tactically, it only gets used for sales-force automation • Highlighting how firms have struggled to move forward with a monolithic single point-of-failure by making CRM the bottleneck of all integration and data management. • Discussing how to leverage CRM as part of a more strategic customer-first, digital wealth platform • Evaluating the evolution of CRM, approaches to integration, strategies for data management, and the features you need to think about in order to truly differentiate your business • Assessing how firms can quickly leverage AI and machine learning as part of an intelligent customer management solution **Bryan Sachdeva, VP of Wealth Management Solutions of NexJ Systems**
12:15	**Illustrating how to utilise Social Media platforms to substitute face-to-face propositions to assess opportunities** • Evaluating how Social Media has changed the landscape to underpin opportunities to capitalise upon • Exploring varying needs of Social Media platforms between segment audiences to highlight key areas of potential to remain competitive • Assessing demands for quick and smooth contact can be met through social media channels to enhance client satisfaction • Highlighting how social media platforms within digital strategy could lower costs to become more competitive • Reviewing key regulations placed upon social media to assess its limitations to illustrate how it's best implemented coherently within a digital strategy **Tina Cracknell, Head of Digital Marketing, UBS Wealth Management**
12:45	Lunch and networking
13:15	**The next digital disruption: Exploring the myriad roles of ETFs within Wealth Management** • Expansion of the ETF industry – why the growth and where next? • ETF Usage • Why Active vs Passive is an old discussion • Digital Investment Management and the Democratisation of Investing **Jasdeep Hansra, UK Distribution, Deutsche Asset Management**
13:45	**The Millennial Pull: Assessing growing markets to evaluate increasing desires for digital to enable convenience and forecast prospective needs** • Illustrating contrasting expectations between successful entrepreneurs to those with inherited wealth to determine demands • Assessing millennial's increasing need for ease and convenience to ensure a seamless service offering • Exploring likelihood of future technology drivers to estimate forthcoming innovation requirements and conditions from clientele • Discussing increasing technology use from senior clients in their advanced years to assess further technology drivers to underpin digital integration in WM • Underpin if millennial clientele will compliment or confuse your overall business strategy to gain a competitive advantage **Daniel Hernandez, EMC Head E-Connectivity Solutions, Commerzbank AG**
14:15	Afternoon refreshments and networking
14:45	**Speaker Hosted Roundtables** 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.

	Each roundtable session lasts for 45 minutes, and delegates may attend up to 2 roundtables
Roundtable 1	Evaluating how best to use content as a strategic marketing tool to both engage and retain clients **Vidur Varma, Product Director - UK Consumer Bank & International Personal Banking EMEA, Citi**
Roundtable 2	Digital Decisions: Standardise for Scale or Differentiate for every Client… Why not both?" **Philipp Zerhusen, Director Market Development, FactSet Digital Solutions GmbH**
Roundtable 3	Imagining a Digital-Only Wealth Management Organization, Ground Up **Jinendra Jain, Senior Product Management Director, Moxtra**
16:15	Chair's summary and close of conference