



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

## *2018 Speakers Include*

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- James Dunne**, Head of Digital Investment, **Santander**  
**Vidur Varma**, Product Director - UK Consumer Bank & International Personal Banking EMEA, **Citi**  
**Tina Cracknell**, Digital Marketing Director - UK, **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 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 Investments**  
**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**  
**Ram Nithyanandan**, Director of Solutions Services, **Moxtra**  
**Nikhita Iyar**, Solutions & Strategic Alliances Director, **Moxtra**  
**F. Edward Lopez**, Chief Revenue Officer, **JHC**  
**Dianna Raedle**, Chief Executive Officer, **Deer Isle Group LLC**

07:30	Registration and refreshments
08:20	Chair's opening remarks - Bartosz Golba, Head of Wealth Management, GlobalData
08:30	<p><b>Uncovering wealth management client insight to assess innovative digital opportunities</b></p> <ul style="list-style-type: none"> <li>Assessing digital movements made by 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>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	<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 the 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 Wealth Management</b></p>
9:30	<p><b>Embedded collaboration for client engagement in wealth management</b></p> <ul style="list-style-type: none"> <li>Exploring the current wealth management industry landscape to underpin the need for more sophisticated platforms</li> <li>Illustrating how Moxtra's intuitive, custom tailored solutions for omni-channel client engagement digitally transform the wealth management experience for the mobile era</li> <li>Case Study: Citi hello <ul style="list-style-type: none"> <li>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</li> </ul> </li> </ul> <p><b>Nikhita Iyar, Solutions &amp; Strategic Alliances Director, Moxtra</b></p>
10:00	Morning refreshments and networking
10:30	<p><b>Assessing how targeting new audience segments could impact corporate branding</b></p> <ul style="list-style-type: none"> <li>Q&amp;A session with Chair that discusses: <ul style="list-style-type: none"> <li>Challenges associated with branding and reputation when targeting new client segments</li> <li>Highlighting best practices that will mitigate the damage to branding</li> </ul> </li> <li>Q&amp;A session with the audience</li> </ul> <p><b>Sasha Dabliz, Marketing Director, Rothschild &amp; Co. Wealth Management</b></p>
11:00	<p><b>Applied digitalization: Building a superior wealth management proposition</b></p> <ul style="list-style-type: none"> <li>Highlighting advances in technology to illustrate impacts across industries and specifically wealth management</li> <li>Exploring innovation within the digital landscape to determine new tools and features appearing in increasingly short cycles</li> <li>Embracing new technologies and processes within wealth management to underpin advantages that enable advisors to create a fully integrated and digital client experience</li> <li>Digital components to streamline processes, provide premium client experiences and asset allocation at reduced operating costs</li> <li>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</li> </ul>

	<b>Philipp Zerhusen, Director Market Development, FactSet Digital Solutions GmbH</b>
11:30	<p><b>Content marketing: Obtaining an appropriate personal content 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 content strategy</li> <li>• Illustrating methods of assessing interests between audience segments to create the best content</li> <li>• Evaluating various strategies within digital channels to ensure content meets clients' needs</li> <li>• Assessing HNWs segment audience to forecast future needs of next- gen clientele to better prepare engaging content</li> <li>• Exploring differing client segments to underpin digital communications that satisfy varying clientele – eg women and Millennials</li> </ul> <p><b>Kirsten Burt, Head of Marketing, UK &amp; Jersey, UBS Wealth Management</b></p>
12:00	<p><b>Digital portfolio management: Technology for robo and personal advice</b></p> <ul style="list-style-type: none"> <li>• Discussion incumbent entry into digital wealth management to underpin competition and increased efficiency</li> <li>• Highlighting our Digital Financial Portfolio Management Backoffice to illustrate it's regulatory savviness</li> <li>• Evaluating how to build your robo-advisor of our specialised and trustworthy technology, that delivers top customer experience</li> <li>• Exploring benefits: From analyzing portfolios, managing assets to our very special „building bricks“ and a great variety of basic portfolios</li> <li>• Discussing Backoffice to illustrate potential for increased digital efficiency and flexibility</li> </ul> <p><b>Mario Alves, Head of Sales and Partner Management, aixigo AG</b></p>
12:30	Lunch and networking
13:30	<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 the importance of continuous incremental growth within the sector to depict innovative 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-advice to highlight more tailored digital experiences to provide an increasingly personal service</li> <li>• Debating efficiency gains through implementing robo-advice to underpin key performance indicators</li> </ul> <p><b>Panellists:</b>  <b>Sabrina Del Prete, formally Chief Digital Transformation Officer, Williams &amp; Glyn, RBS</b>  <b>Will Bailey, EVP, Europe and Innovation, InvestCloud</b>  <b>Gareth Johnson, Divisional Director - Head of Digital Channels and Investment Services, Brewin Dolphin</b>  <b>Rob Hudson, Head of Digital Distribution, Aberdeen Standard Investments</b>  <b>Adam French, Co-Founder &amp; CEO, Scalable Capital</b></p>
14:15	<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 a dynamic 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 digital, traditional balance</li> <li>• Creating an appreciation for digital support within a humanistic sector that compliments industry operations to increase efficiencies</li> <li>• Debating where the balance lies within high touch digital services without compromising HNW desires, as well</li> </ul>

	<p>as overall business needs</p> <ul style="list-style-type: none"> <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 for tailored communications to maximise on 'push' channels</li> <li>• Investigating how technical innovation will internally enable lower costs and greater time efficiencies</li> </ul> <p><b>Simon Kingsnorth, Global Head of Digital Marketing, Citi Private Bank</b></p>
14:45	Afternoon refreshments and networking
15:15	<p><b>Exploring the need for excellent content marketing to meet the digital needs of a growing clientele to ensure success</b></p> <ul style="list-style-type: none"> <li>• Assessing the various needs of different audience segments 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 communication to underpin which channel to utilise with different audience segments to establish and enhance strong relationships</li> <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>
15:45	<p><b>The future of wealth management: A threat to financial markets stability or a pioneer of a more efficient investment culture?</b></p> <ul style="list-style-type: none"> <li>• Where are we on the digitisation advancement in terms of technology and acceptance?</li> <li>• What exactly are we digitising in the broad range of wealth management activities and where do we see the most benefits?</li> <li>• Digital advisory requires interdisciplinary expertise between financial engineering and financial planning. How confident are we?</li> <li>• How asset allocation decisions are made and are the portfolios really "optimised"? Could this be leading to herding and systemic risk?</li> </ul> <p><b>Jennifer Hansen, Executive Vice President, Head of Global Sales Strategy &amp; Execution, Saxo Markets</b></p>
16:15	<p><b>Disruption or death: Leveraging fintech to prepare and transform wealth management for the new age</b></p> <ul style="list-style-type: none"> <li>• Is Artificial Intelligence a threat or an opportunity to augment wealth advisory?</li> <li>• Evaluating how big data can help understand a client's true ability &amp; willingness to take risks</li> <li>• Does IoT have the potential to deliver a better client experience on managing wealth?</li> <li>• What can be learnt from gourmet cooking to deliver personalised content?</li> </ul> <p><b>Vidur Varma, Product Director - UK Consumer Bank &amp; International Personal Banking EMEA, Citi</b></p>
16:45	Chair's closing remarks - Bartosz Golba, Head of Wealth Management, GlobalData

<b>Digital Integration in Wealth Management</b> <b>Thursday 22<sup>nd</sup> February 2018</b> <b>Programme Day Two</b>	
08:30	Registration and refreshments
08:55	Chairs opening remarks - Oliver Williams, Head of WealthInsight, GlobalData
9:00	<p><b>Evaluating how best to integrate social media into your overall digital strategy to maximise your technological</b></p> <ul style="list-style-type: none"> <li>• Detailing drivers of social media to forecast the 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>Gian Franco Baldinotti, Marketing Director, Generali</b></p>
09:30	<p><b>10 steps to digital success: A practical approach to delivering compelling digital experiences</b></p> <ul style="list-style-type: none"> <li>• The marketing technology landscape today – the problem <i>and</i> the solution</li> <li>• Identifying business KPIs and your barriers to digital success</li> <li>• Why personalisation will be the customer experience differentiator in wealth management</li> <li>• Building a repeatable framework for delivering compelling online experiences that drive results</li> </ul> <p><b>Matthew Tilbury, Director and Digital Experience Consultant, Codehouse</b></p>
10:00	<p><b><u>Panel Discussion</u></b></p> <p><b>Evaluating the implications of Brexit to attain a secure understanding of potential regulatory requirements and plausible futures to mitigate uncertainty</b></p> <ul style="list-style-type: none"> <li>• Exploring the 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 pressures to assess business strategies</li> <li>• Highlighting implications placed on the management of clients to assess future business strategy</li> <li>• Reviewing future needs such as subsidiaries, mergers or acquisitions, to pinpoint upcoming needs and business requirements to stay competitive</li> </ul> <p><b>Panelists:</b>  <b>John Barrass, Deputy Chief Executive, Personal Investment Management and Financial Advice Association (PIMFA)</b>  <b>Sabrina Del Prete, formally Chief Digital Transformation Officer, Williams &amp; Glyn, RBS</b></p>
10:30	<p><b>Strategies for enabling a customer-first digital wealth platform</b></p> <ul style="list-style-type: none"> <li>• Exploring CRM to underpin when implemented tactically, it only gets used for sales-force automation</li> <li>• 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.</li> <li>• Discussing how to leverage CRM as part of a more strategic customer-first, digital wealth platform</li> <li>• 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</li> <li>• Assessing how firms can quickly leverage AI and machine learning as part of an intelligent customer management solution</li> </ul> <p><b>Bryan Sachdeva, VP of Wealth Management Solutions of NexJ Systems</b></p>
10:45	Morning break and refreshments
11:05	<p><b>Assessing digital strategies that establish end-user confidence to ensure trust and retention of clients to sustain competitive advantage</b></p> <ul style="list-style-type: none"> <li>• Assessing differing desires for 'human' interaction within target segments to establish a common need for</li> </ul>

	<p>increasing clarity and technology sophistication across digital platforms</p> <ul style="list-style-type: none"> <li>• Highlighting how a more 'human' interaction can be achieved through digital streams to ensure client trust and retention</li> <li>• Deconstructing integrated methods of communication that offer absolute transparency and simplicity to attain that trust</li> <li>• Illustrating digital tools that provide opportunities for clear and straightforward communication methods to gain a strong confidence from end users</li> <li>• Underpinning digital audience segmentation techniques to highlight best practice to retain senior and long-lasting clients</li> </ul> <p><b>James Dunne, Head of Digital Investment, Santander</b></p>
11:35	<p><b>Developing world-class tools to facilitate cryptocurrency trading</b></p> <ul style="list-style-type: none"> <li>• Highlighting institutional investors and issues with cryptocurrencies within their existing trading infrastructures</li> <li>• Exploring Blockchain Terminal to evaluate tools to directly address needs that also meeting other key informational needs of cryptocurrency traders</li> </ul> <p><b>Dianna Raedel, CEO, Deer Isle Group LLC, Advisor, Blockchain Terminal</b></p>
12:05	<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</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 and how they can be met through social media channels</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, Digital Marketing Director - UK, UBS Wealth Management</b></p>
12:35	<p><b>Wealth management 2.0: A transformative case study</b></p> <ul style="list-style-type: none"> <li>• Mandating digital as part of your firms DNA</li> <li>• The digital revolution - its more than just front-office engagement</li> <li>• Introducing firm-wide digital oversight at your finger-tips - new tools and confidence for the Csuite</li> </ul> <p><b>F. Edward Lopez, Chief Revenue Officer, JHC</b></p>
13:05	Lunch and networking
14:05	<p><b>The next digital disruption: Exploring the myriad roles of Exchange-Traded Funds within wealth management</b></p> <ul style="list-style-type: none"> <li>• Expansion of the ETF industry – why the growth and where next?</li> <li>• ETF usage</li> <li>• Why active vs passive is an old discussion</li> <li>• Digital investment management and the democratisation of investing</li> </ul> <p><b>Jasdeep Hansra, UK Distribution, Deutsche Asset Management</b></p>
14:35	<p><b>Structured products within digital wealth management</b></p> <ul style="list-style-type: none"> <li>• How Digital Integration has helped unearth value in Structured Products</li> <li>• The past, the present and the future of Structured Products in WM</li> <li>• Asia, Europe and the Americas – more than 3 different ways to trade Structured Products</li> </ul> <p><b>Daniel Hernandez, EMC Head E-Connectivity Solutions, Commerzbank AG</b></p>

15:05	Afternoon refreshments and networking
15:35	<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>Digital decisions: Standardise for scale or differentiate for every client... Why not both?</p> <p><b>Philipp Zerhusen, Director Market Development, FactSet Digital Solutions GmbH</b></p>
Roundtable 3	<p>Imagining a digital-only wealth management organization, ground up</p> <p><b>Ram Nithyanandan, Director of Solutions Services, Moxtra</b></p>
17:05	Chairs closing remarks - Oliver Williams, Head of WealthInsight, GlobalData