SESSIONS

DAY 1 - BUSINESS OPTIMISATION & DIGITAL INTEGRATION - 16/03/2021

Networking Power Hour

12:30 - 13:30

2021 Vision: The top 10 trends shaping wealth management, this year and beyond

13:30 - 13:45

Predictions for the next decade. The roaring twenties come anew?

Participants

David Durlacher - Chief Executive Officer, Julius Baer International

Wealth Leaders Panel: Surviving and succeeding in the second wave of digital wealth

14:00 - 14:45

Hear from heads of leading wealth managers as they discuss how their long-term digital strategies have been impacted in the wake of a very turbulent 2020.

- Having been forced to rapidly accelerate adoption of digital channels, which of these changes are here to stay?
- How has Covid-19 forced wealth management firms to re-evaluate and reprioritise their digitalisation programmes? What has remained important amidst the pandemic and what has fallen by the wayside?
- Defining the new competitive edge

Plus live audience Q&A

Participants

Moderator: Anastasia Georgiou - Head of Adviser Solutions, EMEA, Morningstar

Panellist: Charlotte Ransom - Co-Founder and CEO, Netwealth

Panellist: Ian Pickford - Head of Financial Planning and Wealth Management, Mazars

Panellist: Kabir Sethi - Managing Director, Head of Digital Wealth Management, Merrill Lynch Wealth Management

Leading-edge vs Bleeding Edge: Understanding emerging technologies and their practical potential

15:00 - 15:30

AI, ML, NLP… how to avoid death by acronym, cut through the noise and distinguish which of the latest tech trends will benefit your bottom line.

Participants

Moderator: Xavier Gomez - Founder & COO, INVYO

Panellist: Jiahao Sun - Associate Director, Artificial Intelligence, RBC Wealth Management

Networking Break

15:30 - 16:15

Learning from the past and the future: Insights for wealth managers

16:15 - 16:30

With a career spanning medieval archaeology and cutting-edge technology development, Adam will share his reflections and lessons learnt after a decade of factoring this experience into designing products and services for the wealth management market. He will demystify some technology concepts, propose some practical solutions, and demonstrate how these approaches have made a difference to ADA and its clients.

Participants

Adam Jones - Chief Technology Officer, Redington

Insights from the Innovation Lab at Coutts: agile transformation and our digital advice journey

16:45 - 17:00

Participants

Jonathan Hartley - Head of Digital Investment Design, Coutts

Open Interactive Discussion

17:15 - 18:15

An opportunity to connect with peers and engage in informal discussion around the key challenges facing Wealth Managers on their journey to digitalisation.

Close of Day 1

18:15 - 18:20

SCHEDULE

DAY 1 - BUSINESS OPTIMISATION & DIGITAL INTEGRATION - 16/03/2021

Digital Wealth Virtual

16 - 17 March 2021
Central European Time (CET)
Virtual event

TIME	
12:00	**12:30** - Networking Power Hour
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18:00	**18:15** - Close of Day 1

SESSIONS

DAY 2 - CLIENT EXPERIENCE & DIGITAL ADVICE - 17/03/2021

Energy-Boosting Yoga Session

09:30 - 10:00

Enjoy a gentle start to the day, preparing your body and mind with our 30-minute yoga session.

Why wealthtech isn't working (yet)

10:30 - 10:45

Participants

Ned Phillips - Founder, CEO, Entrepreneur, Bambu

The roaring 20s: from Product Push to Client Pull. A fresh view of the value in a Digital Age

11:00 - 11:15

With ease of comparison and asset transfer, technology is turning standardised products into commodities. Digital strategies that rely on engagement, marketing and sales alone risk fee compression due to their reliance on these standardised products. At the extreme this risk becomes a ‘race to the bottom’.

How can wealth businesses protect margins and client value through enthusiasm for their digital service? What does ‘segment of one’ really mean? And, with value moving from products to client solutions what implications does this have for contemporary digital strategies?

Participants

David Tiller - Former Global Head of Client Technology Solutions at Standard Life Aberdeen; Director, Origo

Wealth Leaders Panel: Rethinking the value proposition in the era of hyper-personalisation – Creating a truly holistic client-centric experience

11:30 - 12:15

- How can creating a ‘segment of one’ be achieved at scale?
- Leveraging data insights to drive engagement and deliver personalisation at a granular level
- What tools does the advisor need to support this kind of holistic approach?
- How are the roles of marketing, tech and business development merging as a result of digitalisation?
- How can hybrid models be used to supplement a traditionally high-touch market and add meaningful value to the UHNW experience?

Participants

Moderator: Meghna Mukerjee - Senior Analyst, Wealth Management, Aite Group

Panellist: Apiramy Jeyarajah - Head of UK Wholesale, Aviva Investors

Panellist: Will Kingston - Head of Customer Experience, Close Brothers

Panellist: Juan Sánchez del Campo - Head of Client Solutions, Renta 4 Bank

Networking Break

12:15 - 13:15

Reimagining the digital wealth customer journey from the client perspective

13:15 - 13:45

A practical exploration into creating a seamless omni-access client experience and implementing digital tools to support and enhance advisors.

Participants

Ilan Davidovici - Principal, Client Experience, Edward Jones

Ben Goss - Chief Executive Officer, Dynamic Planner

John Crittenden - Chief Strategy Officer, Stealth Mode Platform

Next Customer, Please: Prospecting in a pandemic

14:00 - 14:45

The pandemic pushed wealth management and financial advisors into the era of digital communications including Zoom calls, social media and the need for lead gen when there were no online conferences. Learn from our panel of senior marketing experts what works and what didn't work along with what strategies and tactics will stay in digital in the post-pandemic era.

Participants

Moderator: April Rudin - President, The Rudin Group

Kirti Naik - Head of Marketing & Communications, BNY Mellon Wealth Management

Dipti Kachru - Chief Marketing Officer, US Wealth Management, JPMorgan Chase & Co

Close of Digital Wealth Virtual

14:45 - 14:50

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