

Schedule of the Day					
The Ballroom	0830-0900	Breakfast	Informal networking - over breakfast		
The Ballroom	0900-0910	Welcome	With Daniel Gilmore, Sales Director, Owen James		
The Ballroom	0910-0940	Keynote Presentation	Innovation and the drivers of change. With David Smith , Chief Executive, Global Futures and Foresight		
The Ballroom	0940-0950	TechTalk 1	Leveraging insights from the pandemic to upgrade your advisory business. With Alex Seiler , UBS Partner		
The Ballroom	0950-1000	TechTalk 2	Get out of jail card. How baking audit and governance into your process can keep you on the right side of your stakeholders. With Adam Jones , Redington		
Breakout rooms	1005-1115	Roundtable Session	Future proof wealth management. Climate resilient investment decision making and initiating the ESG conversation with clients	Digital Financial Communication, Planning and Shopping. Combining the entire adviser experience on a single integrated platform.	Build, buy or partner what strategy is winning? What impact is M&A having on innovation?
The Ballroom	1115-1135	Morning Coffee	Grab a refreshment and catch up with your peers		
The Ballroom	1135-1210	Speed Networking	Structured networking - An opportunity to meet some new faces		
Breakout rooms	1215-1325	Roundtable Session	Leveraging platform technology to minimise the risks and costs a wealth manager incurs in offering private markets investing to their clients	If data is the new gold, how can wealth managers find the key to the treasure chest?	What role is AI playing in driving the future of Financial Services?
The Ballroom	1325-1425	Lunch	A seated formal lunch		
The Ballroom	1420-1430	TechTalk 3	DLT – why all the hype? With Chris Ansara , ALT/AVE & docStribute		
The Ballroom	1430-1440	Closing Keynote	Scene Setter Findings. With Daniel Gilmore, Sales Director, Owen James		
Wave Goodbye	1440-1500	Fizz and farewell	We wish you a safe trip back to the office or home.		

TOPICS TABLED FOR DISCUSSION IN THE ROUNDTABLES

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Please see below for more information on what will be covered within each roundtable.

1. If data is the new gold, how can wealth managers find the key to the treasure chest?

From the outset of the client journey, and throughout the entire client lifecycle, a wealth of data is collected that can be leveraged to strengthen client relationships.

The opportunity for relationship managers to gain deep insights into a client's behaviour and sentiment, so they can determine next best actions that will foster trusted relationships and grow revenues, is immense.

However, many wealth managers struggle to analyse, interpret and use data effectively, to drive touchpoints and recommendations that are both relevant and engaging. The volume and quality of data have never been greater, but it can be difficult to extract clear signals amid the big data noise.

In this roundtable we will explore:

- What are the key drivers for unlocking value from data? E.g., increasing revenue, creating efficiencies, improving client experience
- What is useful data?
- What do we need to know? What would we like to know?
- What data could help to uncover new opportunities?
- What data do you capture for compliance purposes that is reused in other processes?
- How can we change the way we present data to advisors so they are able to take action?
- CRM systems are sometimes seen as a data entry chore. How can we change this?
- How do you share client lifecycle data across teams? What are the challenges?
- Self-service by client – good or bad?
- To what extent do you want to empower the client to see their own data? Does this differ to the advisors view of data?

Expert: Wealth Dynamix

2. Future proof wealth management. Climate resilient investment decision making, initiating the ESG conversation with your clients. What does this bring to the wealth manager, adviser and most importantly the client?

Interest in sustainable investment solutions is on the rise. 2021 EY Global Wealth Research showed 78% of global wealth clients have sustainability goals while 47% of these clients believe their wealth manager can do more to understand those sustainability goals.

But as financial advisers it can be challenging to initiate and structure this conversation.

In this session we'll discuss

- What resources are out there to navigate a changing climate and to show the impact of a changing climate on the wealth?
- How the outcome of these discussions can feed through into climate resilient investment solutions for clients.
- What is the value-add for the client, the adviser and you as a bank or wealth manager?

Expert: Ortec Finance

3. Digital Financial Communication, Planning & Shopping. Combining the entire adviser experience on a single integrated platform.

In this roundtable, we will discuss the game-changing benefits of combining three tools into a single, integrated platform. We will demonstrate how you can transform the way your advisers interact with clients, using beautifully designed custom experiences whilst executing on the simplest to the most sophisticated needs of all investors. We will look at how AI tools, the Cloud and a central digital Warehouse have enabled this true digital revolution. Further, we will explore best practices in actively engaging and maintaining users at every stage of their digital journey through the use of both gaming and decision theory.

- Digital communication is critical to any wealth management relationship. When successful, it should enable the creation of custom experiences that can be optimised and refined for an unlimited number of personas
- Digital planning is about completely comprehensive financial plans, at any stage of the wealth continuum, readily available and usable on the fly. Digital planning is a necessity because planning and execution are the bases of any meaningful wealth management relationship
- Digital financial shopping is the final piece of the puzzle – a way to enable simple search and simple execution on behalf of wealth managers working for their clients, as well as simple financial product additions and tagging by asset managers.

Expert: InvestCloud

4. Leveraging platform technology to minimise the risks and costs a wealth manager incurs in offering private markets investing to their clients

New analysis by PwC forecasts that assets under management (AUM) in private markets will expand by between \$4.2 trillion and \$5.5 trillion in the years up to 2025. Private markets are expected to make up more than 10% of global AUM by 2025 in their base-case scenario.

In 2019 our experts launched a next-generation online platform specifically aimed at enabling wealth managers to offer private markets investing to their clients.

Whilst their innovative technology platform provides access to allocations in leading private equity funds and removes the barrier to entry of high minimum commitments, most of the development focus has been on easing the legal, administrative and regulatory burdens that private markets investing brings with it. For most wealth managers, these areas present an insurmountable hurdle to offering a thoughtful, strategic, professionally-curated & truly diversified private markets allocation.

In this roundtable, the discussion will focus on these areas, to understand what they are and how a wealth manager can use new technology to manage them. It will look at the broader potential for platform technology to open up the world of alternative and private investments to a broader base. Technology that enables wealth managers to participate in a compelling growth area with confidence, for the benefit of their clients.

Titanbay is a leading provider of bespoke Private Market solutions to the private banking & wealth management industry. We are delighted to be joined on the panel by Mercer – a global alternative investment expert that provides advisory services as well as customised and pooled investment solutions to some of the world's largest institutional investors.

Expert: Titanbay/Mercer

5. What role is AI playing in driving the future of Financial Services?

Artificial intelligence is revolutionising how consumers and companies alike access and manage their finances. The global AI fintech market is predicted to reach \$22.6B in 2025.

In fact, 70% of all financial services firms are using machine learning to predict cash flow events, fine-tune credit scores and detect fraud, according to a survey by Deloitte Insights.

An Economist Intelligence Unit (EIU) research report found that 86% of Financial Services executives plan on increasing their AI-related investments through 2025. The study analysed the sentiments of 200 business executives and C-suite leaders at investment banks, retail banks and insurance companies in North America, Europe and Asia-Pacific.

Key insights from the study highlight investment banking firms are the leading adopters of AI and machine learning technologies in Financial Services, closely followed by Retail.

In this session our expert will talk about the role of AI in FS and how investment banking operations rely on it to fine-tune algorithms and prediction models to quantify and reduce risk; how retailers rely on predictive analytics to find new insights that can help retain customers and transition them from brick-and-mortar to digital channels; how firms are adopting AI to reduce operational costs, followed by greater predictive analytics to improve decisions and scale up employee capacity to handle volume-based tasks and much more....

6. Build, buy or partner what strategy is winning? What impact is M&A having on innovation?

According to PWC, competition for strategic market advantage continues to fuel M&A across financial services, with activity in the first half of 2021 led by deals for technology and innovation. Acquisitions and divestitures are expected to gain momentum in the upcoming months, as banks, insurance companies and asset managers seek to optimise cost structures, grow top-line growth, and increase efficiency and margins. As such, transformation is very much front of mind for dealmakers' overall strategic rationale.

The growing trend whereby businesses can seamlessly integrate finance services into their business models, is set to increase in intensity. As tech giants like Apple, Google and Amazon continue to expand their offerings into the finance space, FS corporates will look to build their capabilities through deal-making and acquisitions of start-ups.

M&A will also be driven by the need for corporates to compete with FinTechs, whose business models may not be subject to the same regulations as traditional FS companies, especially in regard to profitable parts of the banking value chain.

Furthermore, consolidation and collaboration in the industry is expected to continue to rise, particularly across retail banking players, as low interest rates, regulation, and business models reliant on heavy operating costs affect profitability.

THE ROUNDTABLES:

As a delegate, you will be invited to choose the four roundtables in which you would like to participate. The goal is to provide you with a tailored experience.

The roundtables are 70min long with the emphasis on interactivity. The agenda has been carefully researched and thought through. As we abide by the rules of Chatham House, all participants are able to speak openly and freely.

Typically, groups will be made up of 15 delegates. There will be a session expert to set the scene and get the conversation going. This introduction will usually last about 10 minutes before the conversation is opened up to the group by an experienced facilitator, the goal being to ensure that everyone gets stuck in! We want you to lean in rather than sit and soak!!

All sessions will be written up and a two-page summary of each roundtable produced.