



# WealthTech Matters – Autumn 2025

Thursday 6th November 2025 – SEI Investments, 14-18 Finsbury Square, London EC2A 1BR

Schedule of the Day			
Foyer	0830-0900	<b>Breakfast</b>	<b>Informal networking</b> over breakfast
King of Prussia	0900-0905	<b>Welcome</b>	<b>Welcome.</b> An introduction from SEI Investments (Europe) Limited
King of Prussia	0905-0925	<b>Welcome</b>	<b>Scene Setter Findings.</b> Presented by <b>James Goad</b> , Managing Director, Owen James Events
King of Prussia	0925-0955	<b>Tech Talks</b>	Short and punchy presentations from our fintech companies, to tell you what they do - within the space of ten minutes. Their brief is to entertain and educate rather than pitch! The clock will be ticking...
Breakout rooms	1000-1100	<b>Roundtable Session</b>	<i>Please refer below to get a feel for the topics that will be tabled for discussion within the roundtables</i>
Foyer	1100-1120	<b>Morning Coffee</b>	Grab a refreshment and catch up with your peers organically or through organised one to ones
King of Prussia	1125-1155	<b>Structured networking</b>	An opportunity to meet some new faces
Breakout rooms	1200-1300	<b>Roundtable Session</b>	<i>Please refer below to get a feel for the topics that will be tabled for discussion within the roundtables</i>
Foyer	1300-1340	<b>Buffet Lunch</b>	Network with peers over lunch
Breakout rooms	1345-1445	<b>Roundtable Session</b>	<i>Please refer below to get a feel for the topics that will be tabled for discussion within the roundtables</i>
King of Prussia	1450-1520	<b>Keynote Presentation</b>	<b>What Young People, Skills and the Economy Are Telling Us About the Future of Finances.</b> With <b>Jimmy McGloughlin</b> , host of <i>Jimmy's Jobs of the Future</i> podcast
Foyer	1520-1600	<b>Fizz &amp; farewell</b>	Join us for a glass of fizz before heading back to the office or home

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### ROUNDTABLE TOPICS

#### RESPONDING TO THE CHANGING LANDSCAPE

# WEALTHTECH MATTERS

## **1. Planning for the next disruption in market volatility and tech strategy**

Geopolitical tensions, inflationary pressures, and market instability are forcing firms to reassess their technology priorities. The session will discuss how to prepare your tech stack for geopolitical and market shocks, including:

- Assess how recent market volatility is reshaping technology roadmaps in wealth management.
- Share approaches for building flexible, scalable systems that can respond to disruption.
- The role of scenario planning and stress testing in technology strategy.
- How firms are leveraging data to anticipate client concerns and stay ahead of trends.

## **2. Balancing the regulatory tightrope in a digital world**

As regulators tighten expectations around Consumer Duty, AI governance, and data privacy, firms must stay agile while ensuring compliance across increasingly complex ecosystems. This session will explore how WealthTech can help leaders keep pace without slowing innovation, including:

- Strategies for embedding compliance into new digital workflows and client journeys.
- Approaches to managing global regulatory divergence in multi-market operations.
- Balancing innovation and regulatory risk in technology investments.

## **3. Building trust and winning clients as a challenger firm**

Despite outperforming on pricing and performance, newer firms can struggle big brand recognition. This session will explore how challenger firms can scale client acquisition and retain loyalty through digital experience, by discussing how to:

- Differentiate in a crowded market and build trust at speed.
- Leverage referrals and strategic partnerships to reach new client segments.
- Explore how digital experiences and CRM upgrades can enhance retention.

## **4. Is embedded finance a threat or opportunity?**

As embedded finance grows, can wealth managers capitalise on this trend to create stickier propositions – or does it risk eroding their value chain? This session will explore how embedded finance could shape wealth management's future, by:

- Examining the implications of embedded finance for traditional wealth management models.
- Discussing partnerships and ecosystems that allow firms to embed wealth services into broader platforms.
- Debating how to safeguard brand identity and client trust in embedded ecosystems.
- Exploring sponsor perspectives on how their technology supports embedded solutions.

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## 5. How prepared are you for a cyber-attack?

As cyber threats grow in sophistication, wealth managers are under pressure to build resilience across their digital infrastructure. This session will debate the balance between innovation and security in technology adoption, by:

- Examining emerging cyber risks specific to wealth management platforms.
- Sharing strategies for strengthening digital defences and protecting client data.

## 6. Web 3.0: The quiet revolution set to reshape wealth management

While AI dominates the technology agenda, the rise of Web 3.0 with its decentralised architecture, digital ownership models, and tokenised economies may prove to be the most disruptive force in wealth management over the next two decades.

This session will discuss the structural changes it will bring to trust, value transfer, client behaviour, and the advisory role itself, including:

- What Web 3.0 really means for the future of wealth beyond crypto hype
- How decentralisation, tokenisation, and smart contracts could reshape asset classes, custody, and ownership
- How Web 3.0 will accelerate the behavioural shift in Gen Z and Millennial investors
- What trusted advice looks like in a decentralised world – and the risks of being left behind
- Where firms can explore Web 3.0 use cases today

## INNOVATING THE CLIENT EXPERIENCE

### 7. Winning tomorrow's clients today

The intergenerational wealth transfer is simultaneously your biggest opportunity and your biggest risk. With £5.5 trillion set to change hands, this session will discuss how firms must adapt their client strategies across generations, by:

- Personalising journeys for Gen Z, Millennials and women of wealth.
- Retaining clients through estate planning, early engagement and family onboarding.
- Collaborating with brand partners and digital channels to build relevance.
- Using data and client lifecycle tech to drive deeper connections.

### 8. Harnessing technology to build long-term loyalty

With client expectations evolving rapidly, wealth firms must harness digital tools not only to meet service demands, but deepen relationships loyalty. From personalised communications to intuitive client portals and hybrid advice models, this session will discuss how technology is transforming how, when, and where clients engage, including:

- Using digital tools to personalise communication and build trust.
- The role of behavioural data and client preferences in shaping tech-enabled journeys.
- Where hybrid models are working best to improve retention and satisfaction.

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- How client portals, apps, and self-service tools are redefining convenience.
- Common engagement pitfalls with tech – and how to avoid them.

## 9. Fixing API frustrations and improving integration

Firms cite outdated APIs and integration pain as major drags on productivity and digital strategy. This session will tackle the critical need to modernise connectivity across your tech stack, by:

- Resolving real-world API problems and platform gaps.
- Improving coordination with providers to accelerate fixes and updates.
- Understanding how integration pain affects cost-to-serve and client experience.

## LEVERAGING AI FOR OPERATIONAL EFFICIENCY

### 10. Moving beyond data collection to strategic insight

With productivity scores averaging just 6/10 and advisers spending only 36% of their time in front of clients, improving MI is essential. This session will explore how to turn multi-system data into real intelligence, by building governance and standardisation across systems, as well as:

- Using data lakes and BI tools like Power BI to extract meaning.
- Benchmarking time spent on ‘golden hours’ versus admin.
- Benchmark adviser productivity

### 11. Unlocking AI’s potential responsibly

Firms are moving beyond AI experimentation into real-world applications, but success depends on data quality, governance, and risk management. This session will examine how wealth managers can build robust data strategies to unlock AI’s full potential by discussing:

- Practical applications of AI that enhance compliance and client engagement without eroding trust.
- Steps to embed AI governance and mitigate risks such as deepfakes or bias in decision-making.
- Lessons from proof-of-concept pilots and explore how to scale successful use cases.

## STRATEGIC APPROACHES TO TECHNOLOGY & WORKFORCE

### 12. Why digital transformation fails and how to fix it

70% of transformation projects fail, often due to a lack of buy-in, unclear goals, and poor planning. But given that change is non-negotiable, how can firms break the cycle and fix the root causes? This session will discuss how to:

- Identify the real blockers: Is it people, process or planning?
- Create “change champions” across front and back office.



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- Deliver clarity of purpose from the C-suite down.
- Avoid the common traps in tech-led change.

## 13. How digital strategies, AI and data can drive growth

Wealth managers face mounting pressure to deliver operational excellence, enhance client experiences, and retain relevance in an evolving marketplace. As firms embrace AI, CRM enhancements, and advanced data strategies, how can they ensure their investments deliver sustainable value rather than costly transformation failures?

This roundtable will explore:

- How are firms leveraging AI integration and data insights to enhance efficiency and deliver superior client outcomes.
- The role of digital tools in today's competitive landscape.
- Overcoming organisational and cultural resistance to digital change.
- Future-proofing your firm's digital strategy in the era of intergenerational wealth transfer.

*Expert: Objectway*

## 14. Bridging talent and technology to attract the next generation of advisers

Talent remains one of your top concerns. Can digital tools, new role models, and second-career pathways help firms build the next generation of advisers? This session will discuss how to combat the talent gap by discussing how to:

- Compete with tech and retail for digitally savvy candidates.
- Understand new guidance models and client coaching roles.
- Rethink progression from paraplanning and admin into advice.
- Tap into mid-career talent pools and offer purposeful work.

## 15. The risks and rewards of multi-vendor relationships

The WealthTech market is crowded with niche providers – so how do firms build coherent systems from disparate solutions? This session will share strategies for vendor management and integration success, as well as discuss:

- Whether platform consolidation or open architecture better serves long-term strategy.
- How firms can maintain agility in a fast-changing vendor landscape.
- How to integrate fragmented tech ecosystems into coherent platforms.
- Regulatory expectations around outsourcing and third-party management.

## FUTURE-PROOFING ADVISE

### 16. How technology can enable smoother handovers and client continuity

Many firms are grappling with adviser succession so how can technology help? This session will discuss how to capture and transfer adviser knowledge as well as support client retention during transitions, by:

- Exploring the role of technology in supporting adviser succession planning.
- Sharing strategies for engaging clients during adviser transitions.
- Discussing how firms can use data insights to identify succession risks and opportunities.
- Examining how digital tools can help capture and transfer knowledge between advisers.

### 17. Redefining productivity in the front office

With growing demands on advisers, wealth managers are exploring new ways to measure and enhance productivity without alienating staff. This session will address low productivity by:

- Debating how productivity in wealth management should be defined and measured in 2025.
- Exploring tools and techniques for freeing advisers from admin to focus on growth and client engagement.
- Sharing strategies for embedding a culture of continuous improvement and aligning productivity with client outcomes

### 18. The skills and roles of the adviser of the future

As technology reshapes the adviser's role, what will the next generation of wealth managers look like – and how can firms prepare? This session will discuss how the role of advisers is evolving in a hybrid, digital-first world as well as:

- How to recruit and develop advisers with future-facing skillsets.
- How to can support advisers in transitioning to new ways of working.
- How technology can augment human expertise rather than replace it.