

WealthTech Matters – Autumn 2025

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

Schedule of the Day						
Foyer	0830-0900	Breakfast	Informal networking over breakfast			
King of Prussia	0900-0905	Welcome	Welcome. An introduction from Caroline Deutsch , Head of UK/EMEA Marketing, SEI Investments (Europe)			
King of Prussia	0905-0925	Welcome	Scene Setter Findings. Presented by James Goad , Managing Director, Owen James Events			
King of Prussia	0925-0955	TechTalk 1	How Karbon is revolutionising CLM for Financial Institutions. Mike Pszenicki, Head of CLM Transformation at Delta Capita			
		TechTalk 2	How RegTech Turns Compliance into Competitive Advantage. Chris Davies CEO at Model Office-MO®			
		TechTalk 3	Behavioural Intelligence in Action: The Future of Personalisation. Dr Greg Davies, Head of Behavioural Finance at Oxford Risk			
Breakout rooms	1000-1100	Roundtable Session	Leveraging behavioural science to drive digital engagement	Hypercompetition in financial advice - How to grow when the old playbook stops working	Personalising Behavioural Insights with Technology	Is your IT infrastructure truly resilient to today's risks?
Foyer	1100-1120	Morning Coffee	Grab a refreshment and catch up with your peers organically or through organised one to ones			
King of Prussia	1125-1155	Structured networking	An opportunity to meet some new faces			
Breakout rooms	1200-1300	Roundtable Session	The future tech stack: How a single ecosystem can transform and future-proof your business	Winning tomorrow's clients today	How digital strategies, AI and data can drive growth	Driving productivity through smarter, frictionless onboarding & client lifetime management
Foyer	1300-1340	Buffet Lunch	Network with peers over lunch			
Breakout rooms	1345-1445	Roundtable Session	Unlocking AI's potential responsibly	Redefining productivity in the front office	Building trust and winning clients as a challenger firm	Cyber scenarios wealth & fintech leaders can't ignore
King of Prussia	1450-1520	Keynote Presentation	What Young People, Skills and the Economy Are Telling Us About the Future of Finances. With Jimmy McLoughlin , host of Jimmy's Jobs of the Future podcast			
Foyer	1520-1600	Fizz & farewell	Join us for a glass of fizz before heading back to the office or home			

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ROUNDTABLE TOPICS

YOUR BUSINESS

1. Is your IT infrastructure truly resilient to today's risks? How can you modernise to stay ahead of the headlines?

In a financial world defined by rapid change, the ability to withstand disruption and adapt swiftly is essential for lasting success. This session explores how forward-thinking IT modernisation can turn legacy challenges into opportunities. Moving beyond short-term fixes, we will discuss strategies that protect your critical assets whilst fostering innovation for your customers.

- Sharing case studies of reducing technology vendors by transforming fragmented legacy environments into unified, flexible IT ecosystems
- Examining emerging cyber risks specific to wealth management platforms.
- Sharing strategies for strengthening digital defences and protecting client data.
- Considering how to accelerate scalability and responsiveness with cloud-driven infrastructure

Experts: Steve Bomberger, Head of SEI Sphere and Mark Tierney, Chief Technology Officer, SEI Sphere

2. The future tech stack: How a single ecosystem can transform your productivity, delight your customers and future-proof your business

The WealthTech market is crowded with providers – so how do firms build coherent systems from disparate solutions? This session will share strategies for vendor management, exploring how an integrated technology stack can...

- Deliver a better client experience
- Improve the efficiency of your business
- Make your own business more valuable

Expert: David Ferguson, Executive Chairman, Seccl

3. 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

Expert: Steve Stracks, Head of Sales Engineering, International, Investcloud

4. Driving productivity through smarter, frictionless onboarding & client lifetime management

Client expectations are shifting fast, and COOs are under pressure to deliver seamless, compliant, and frictionless onboarding processes that don't compromise on the human touch. Beyond the first interaction, firms are increasingly recognising that client lifetime management (CLM) is not just about technology, but about creating an efficient, transparent, and engaging experience across the full client lifecycle.

This session will ask:

- How can wealth managers and IFAs balance digital efficiency with a personalised, frictionless onboarding journey?
- Meeting AML/KYC obligations without overwhelming clients – what is working in practice?
- How are firms breaking down silos across CRM, compliance, and client service functions to deliver a single view of the client?
- Where are firms investing – workflow automation, e-signatures, data enrichment – and what's really making a difference?
- How can CLM strategies drive retention, client satisfaction, and cross-selling opportunities throughout the client journey?
- What does “good” look like when designing end-to-end CLM processes, and how do COOs champion change internally?

Expert: Robert Roome, Chief Strategy Officer, Wealth Dynamix

YOUR CLIENTS

5. Personalising behavioural insights with technology

Understanding client behaviour is now as important as understanding markets. The opportunity is to use behavioural technology to turn insights into personalised engagement that helps people get invested, stay invested, and feel comfortable along the way.

This roundtable will explore:

- How behavioural technology can deliver personalised insights at scale.
- How technology and advisers together can improve both diagnosis and prescription.
- Why regulation is moving towards more personalised, behaviourally aware advice.
- The commercial upside: more assets invested, stronger retention, greater client trust.

Expert: Dr Greg B. Davies, Head of Behavioural Finance at Oxford Risk

6. Building trust and winning clients as a challenger firm

Despite outperforming on pricing and performance, newer firms can struggle with 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.

Expert: Kadra Aden, Head of UK Product, Dorsum

7. Winning tomorrow's clients today: Hyperpersonalisation and the nextgen wealthtech opportunity

Investor expectations are evolving fast - shaped by new generations, digital experiences, and a demand for relevance at every stage of the investment lifecycle. Wealth managers and banks need to align their value propositions with increasingly diverse client segments, from digital-native investors to high-net-worth families seeking personalisation at scale.

This session will explore:

- How firms can redefine their value proposition to meet distinct client needs across generations and wealth segments.
- The role of hyperpersonalisation in transforming the client experience - from discovery and onboarding through to portfolio construction and review.
- How AI and enhanced data insights can empower advisers and investment officers to design more adaptive, insight-led investment strategies.
- How NextGen WealthTech can help firms build flexibility, scalability, and responsiveness into their client offering.
- What it will take for wealth managers to translate technology capability into tangible client value.

Expert: André Bastos, Head of Sales, Allfunds

8. Leveraging behavioural science to drive digital engagement

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

Expert: Louis Williams, Head of Psychology & Behavioural Insights, Dynamic Planner

WEALTHTECH MATTERS

YOU & YOUR PEOPLE

9. Hypercompetition in financial advice - How to grow when the old playbook stops working

The financial advice industry is facing a perfect storm: competition is increasing, marketing costs are rising, and the pool of high-value consumers is shrinking. Add in the uncertainty of AI-driven disruption, and the economics of growth are shifting fast. In this session we will discuss:

- The growth crunch: The data behind rising competition.
- The cost conundrum: How marketing costs are climbing while returns tighten.
- AI and the unknowns: What LLM-driven changes mean for your strategy.
- Lessons from the wider industry: What's working for other firms

Expert: Matt Cockayne, Chief Revenue Officer, Unbiased

TECHNOLOGY & INNOVATION

10. 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.

Expert: Tracie Harbinson, Director, Solve

11. 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: Tariq Khan, Business Development Director, Objectway

12. Inside the attacker's playbook: 2026 Cyber scenarios wealth & fintech leaders can't ignore

The cyber-attacks shaping 2026 won't look like the ones we face today. From deepfake impersonation of clients and advisers to systemic supply-chain compromises and AI-powered fraud, wealth managers face new risks that demand board-level attention. This session goes beyond debating preparedness - it puts you inside real-world style attack scenarios to uncover blind spots and benchmark wealth management's resilience against other industries.

- Discover how wealth management's cyber-risk exposure compares with other sectors.
- Explore realistic 2026 attack scenarios - drawn from real-world cases.
- Identify where governance, vendor dependencies and response playbooks typically fail.
- Take away FoxTech's latest research on the biggest threats wealth managers must prioritise for 2026.

Expert: Iain Gibbons, Managing Director, FoxTech Cyber