WealthTech Matters – Spring 2025

Thursday 7 May 2026 – 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 SEI Investments (Europe) Limited
King of Prussia	0905-0925	**Welcome**	**Scene Setter Findings.** Presented by **James Goad**, Managing Director, Owen James Events
King of Prussia	0925-0955	**Tech Talks**	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	**Roundtable Session**	*Please refer below to get a feel for the topics that will be tabled for discussion within the roundtables*
Foyer	1100-1120	**Morning Coffee**	Grab a refreshment and catch up with your peers organically or through organised one to ones
King of Prussia	1120-1150	**Keynote**	**Intelligence Over Information** - Leading with influence & resilience. With **Tim Bradshaw**, founder of Sandstone Communications - international leadership and trauma training consultancy
Breakout rooms	1155-1255	**Roundtable Session**	*Please refer below to get a feel for the topics that will be tabled for discussion within the roundtables*
Foyer	1255-1330	**Buffet Lunch**	Network with peers over lunch
King of Prussia	1330-1400	**Structured networking**	An opportunity to meet some new faces
Breakout rooms	1405-1505	**Roundtable Session**	*Please refer below to get a feel for the topics that will be tabled for discussion within the roundtables*
King of Prussia	1510-1540	**Keynote Presentation**	**The Intelligent Enterprise: Thriving in the Age of AI**
Foyer	1540-1630	**Fizz & farewell**	Join us for a glass of fizz before heading back to the office or home

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ROUNDTABLE TOPICS

TECHNOLOGY & INNOVATION

1. The data problem no one has solved

Despite sustained investment, fragmented systems and inconsistent data quality continue to undermine decision-making, resilience and trust. As data becomes central to operations, risk and client outcomes, ownership between the COO and CDO is increasingly unclear.

This session will explore where data strategies are breaking down in practice, focusing on:

- Why traditional CRMs are no longer fit for purpose in end-to-end operating models

- How behavioural, unstructured and AI-generated data are stretching existing data ownership and governance frameworks

- Whether data lakes and modern architectures are simplifying decision-making or amplifying operational complexity

- Where accountability for data quality, control and outcomes should sit between the COO and CDO

2. Data as infrastructure, not an asset

Data quality is repeatedly cited as the limiting factor for AI adoption, productivity, regulatory reporting, cyber resilience and client outcomes. Yet despite sustained investment, many firms are finding that data programmes are failing to change behaviour or improve decision-making at scale.

This session will move the conversation beyond data strategy and architecture to focus on data as operational infrastructure, exploring:

- Who truly owns data quality and decision-making today - and where accountability should sit

- Why data governance frameworks often fail to influence day-to-day behaviour and outcomes

- How much governance is necessary to protect control and trust, and when it begins to slow the business

3. Why trust now fails systemically

As cyber threats, AI-enabled attacks and insider risk escalate, trust is increasingly failing due to gaps between security capability and operational ownership. The challenge is no longer technical resilience alone, but how cyber risk is governed, escalated and acted on across the business.

This session will explore where responsibility and decision-making between the COO and CISO break down in practice, focusing on:

- How identity risk, deepfakes and insider threats expose operating model and accountability failures

- Why security training and awareness fail without clear operational ownership and decision rights

- What boards and regulators now expect to see in terms of escalation, response and accountability post-incident

- How COOs and CISOs are clarifying roles to ensure rapid, coordinated response under pressure

REGULATORY CHANGE

4. Embedding control without killing momentum

Regulation, AI governance and cyber expectations are reshaping how firms design processes, not just monitor outcomes.

With regulation now an operating discipline, rather than a compliance burden, this session will discuss how to shape operating models within complex digital ecosystems, including:

- How Consumer Duty, AI governance and cyber expectations are converging

- What regulators increasingly expect firms to evidence *in practice*, not policy

- Where accountability must remain internal, regardless of automation or outsourcing

5. The human risk no one designed for

Cyber risk, regulatory failures and stalled change initiatives increasingly point to the same underlying issue: systems are improving faster than human behaviour.

This session will explore how firms can design controls, processes and operating models that people can realistically follow. Drawing on behavioural science that improves outcomes - not just client engagement - the discussion will focus on:

- Why training and awareness alone fail to change behaviour, and what works instead

- How predictable human error leads to preventable operating model failures

- What leading firms are doing to design processes that assume error, pressure and shortcuts

YOUR BUSINESS

6. Why bigger firms are becoming harder to run

As firms scale, growing complexity across systems, data, vendors, products and geographies is increasingly driving higher cost, weaker control and inconsistent client outcomes. Scaling without simplicity is now a critical operating challenge, not just an efficiency ambition.

This session will explore where firms have successfully simplified - and where complexity has proved difficult or impossible to unwind - to address the following questions:

- At what point does scale begin to increase cost and erode productivity rather than deliver efficiency?

- Where does operational complexity most directly undermine control, risk management and decision-making?

- How does complexity show up in client experience and outcomes, and where have firms seen measurable improvement through simplification?

- Is operational simplicity now a defining competitive advantage in delivering consistent, high-quality client outcomes?

7. AI after the hype

As firms move from experimentation to execution, AI is shifting from a source of excitement to a test of operational discipline. The challenge is no longer identifying use cases, but understanding where AI can be embedded into core processes without increasing cost, risk or complexity.

This session will explore what firms have learned as AI moves into production, focusing on:

- Which AI use cases are delivering measurable productivity or cost benefits in day-to-day operations

- Where AI is increasing operational friction due to data quality, integration or control challenges

- How firms are embedding governance, oversight and accountability into AI-enabled processes

- Where leaders are pulling back to protect client trust and regulatory confidence

8. Redefining productivity by removing the wrong behaviour

As firms seek to improve productivity without increasing pressure or burnout, the challenge is no longer doing work faster - but deciding which work should stop altogether.

This session will explore how leading firms are redesigning roles, not just workflows, to free advisers and operations teams from low-value activity. Discussion will focus on:

- Which tasks advisers and operations teams should actively look to exit

- Why automation initiatives fail when behaviour, incentives and role design don't change

- How firms are redefining productivity using measures beyond simple "time saved" metrics

9. When outsourcing becomes a control risk

As vendor ecosystems expand across platforms, cloud and AI, COOs face a growing challenge: extracting value from external partners without increasing dependency, cost or risk.

This session moves the conversation beyond integration and vendor selection to focus on dependency, accountability and control, by exploring:

- Where the line truly sits between a strategic partner and a critical supplier

- Where firms have lost leverage in cloud, platform and AI relationships - and why

- What accountability and decision-making must remain firmly internal, regardless of execution model

- How vendor governance needs to evolve as automation and AI become embedded in core operations

10. Owning the outcome in a partner-led world

COOs are outsourcing more across operations, platforms, cloud, data and cyber - while regulators continue to hold firms fully accountable for outcomes.

This session will explore where accountability has become blurred as execution moves externally, focusing on:

- What accountability must never leave the firm, regardless of outsourcing or automation

- How COOs can evidence control, oversight and decision-making when execution sits with third parties

YOUR CLIENTS

11. Trust, behaviour & intergenerational value

Traditional demographic segmentation is no longer sufficient to deliver good client outcomes at scale. Increasingly, firms are using behavioural insight and data to support better decision-making, engagement and long-term relationships - but only where trust is protected.

This session will explore how behavioural data is being used in practice to improve client outcomes across generations, focusing on:

- Where AI-driven personalisation is helping clients make better decisions, and where it risks distorting behaviour or outcomes

- How behavioural insight can support retention, intergenerational engagement and fair value without undermining trust

- How firms are defining ethical boundaries and transparency to ensure behavioural technology supports, rather than compromises, good client outcomes

12. Winning tomorrow's clients without losing today's

As intergenerational wealth transfer accelerates, firms must deliberately redesign propositions to work across different generations, service models and expectations - without fragmenting the client experience or eroding existing relationships.

This session will explore how firms are designing propositions in practice to support wealth transfer and long-term retention, focusing on:

- How different client cohorts define value, and how this should be reflected in proposition design, pricing and service levels

- How firms are structuring advised, non-advised and hybrid propositions without creating confusion or internal tension

- Where proposition design is enabling continuity across generations - and where misalignment is driving attrition

YOU & YOUR PEOPLE

13. Capability and culture to beat change fatigue

Despite sustained investment, many transformation programmes still stall after launch. As hybrid operating states become permanent, the differentiator is increasingly COO leadership behaviour, not delivery methodology.

This session will explore how COOs are shaping capability and culture to sustain change in practice, focusing on:

- How COOs are setting clear direction and priorities in permanent hybrid operating environments

- Where behavioural resistance, rather than technical complexity, requires active leadership intervention

- How COOs are reinforcing accountability, role-modelling change, and sustaining momentum without burning teams out

14. How much transformation can firms absorb?

Firms consistently report improved change capability, yet delivery capacity continues to lag demand. Accidental hybrid operating models, unclear prioritisation and governance drag are becoming systemic - turning transformation itself into a source of operational risk.

This session will shift the conversation from *how to deliver change* to *how much change is sustainable*, exploring when transformation drives progress and when it undermines control and resilience, by asking:

- How are firms deciding what *not* to change, and which initiatives should be delayed or stopped?

- At what point does transformation fatigue become a control, risk or client outcome issue?

- How are leading firms sequencing regulatory, technology and operating model change to maintain momentum without overload?

15. Redesigning roles as automation, AI and outsourcing reshape work

When it comes to the skills for the next operating model, COOs need to think about reskilling without destabilising teams, and what this means for capability alignment.

This session will therefore ask:

- Which roles and skills are shrinking or disappearing?

- Which roles will be needed to meet this demand for design, integration and oversight skills is growing?