

WealthTech Matters – Autumn 2026

Thursday 8 October 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 Caroline Deutsch , Head of International Marketing, SEI Investments				
King of Prussia	0905-0930	Welcome	Scene Setter Findings. Presented by James Goad , Managing Director, Owen James Events				
King of Prussia	0935-0955	TechTalk	You've Been Hacked. Now What? What really happens when ransomware strikes? With Iain Gibbons , Foxtech				
		TechTalk	From Notes to Knowledge – Unlocking firm-wide intelligence with AI. With Alan Gurung , AdvisoryAI				
Breakout rooms	1000-1100	Roundtable Session	Beyond the AI hype – the productivity equation for modern advice firms	Digital resilience - managing risk in an increasingly connected world	Connected by design - the technology ecosystem that evolves with your business	The future of client experience – personalisation without losing the human touch	Data First - the intelligent AI empowered wealth firm
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	TechTalk	Transforming how fund data informs decisions in asset and wealth management. With Lucy Walker , AM Insights				
		TechTalk	Your AI doesn't know your client - Why the history of the relationship matters. With Tessa Lee , Moneyinfo				
Breakout rooms	1155-1255	Roundtable Session	AI in advice - from trial to transformation	Integration after consolidation - turning scale into value	Fixing the onboarding problem – can KYC finally become frictionless?	Who owns the AI decision? Governance, accountability and the new operational risk	The £400bn Problem - why cash-rich clients aren't investing
Foyer	1300-1330	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	The human advantage – building the workforce of 2030	Transformation fatigue - how much change can firms absorb?	Rethinking organic growth - what it takes to scale in today's hypercompetitive market	Digital trust - protecting confidence in a changing advice model	
King of Prussia	1510-1545	Keynote Presentation	AI geopolitics and the future of financial services With Sue Turner OBE , founding director of AI Governance and founding member of the United Nations AI Skills Coalition.				
Foyer	1545-1630	Fizz & farewell	Join us for a glass of fizz before heading back to the office or home				

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Agenda overview:

The wealth management technology conversation has moved on. The question is no longer whether AI, automation and data will transform the industry - it is whether firms can adapt quickly enough to capture the opportunity.

As technology becomes more powerful, the biggest barriers are no longer the tools themselves, but the complexity of implementation: fragmented data, legacy architecture, operational resilience, cultural adoption and changing client expectations.

The next generation of winners will be those that can connect technology, people and processes to create simpler, smarter and more scalable wealth businesses.

ROUNDTABLE TOPICS

TECHNOLOGY & INNOVATION

1. AI in advice - From trial to transformation

AI is rapidly reshaping financial advice - but moving from experimentation to meaningful impact isn't straightforward. In this session, we'll explore how to turn AI pilots into scalable value, drawing on real-world experience within our in-house financial planning firm. We'll discuss the limitations of standalone tools, the risks around data security and third-party providers, and the challenge of stitching together multiple systems.

This session will highlight how more integrated approaches can drive efficiency across advice, compliance and operations - helping firms future-proof their technology while maintaining control over cost, data and client outcomes, through the following objectives:

- Understand when and how AI can add genuine value to your business
- Identify key questions to challenge providers on before adopting new tools
- Understand the operational impact of fragmented vs integrated technology
- Explore practical ways to maintain control over data, costs and long-term flexibility

Expert: Shoten Deshmukh, Head of Digital Strategy & Transformation, Benchmark Capital

2. The £400bn Problem - Why cash-rich clients aren't investing

UK investors continue to hold significant levels of wealth in cash, despite the potential long-term cost of remaining uninvested. For wealth managers, the challenge is not simply persuading clients to invest, but understanding why different clients respond very differently to the same market conditions, communications and investment opportunities.

As firms look to improve engagement while meeting Consumer Duty expectations, could a better understanding of investor behaviour help identify who is being underserved and enable more effective, personalised conversations?

This session will explore:

- Why different clients respond differently to cash-deployment messaging and investment opportunities
- Understanding the behavioural factors behind decisions to remain in cash
- Using behavioural insight to create more personalised engagement without undermining client trust
- Supporting Consumer Duty and Targeted Support through more effective, measurable client outcomes

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

3. Data First - the intelligent AI empowered wealth firm

AI and Agentic AI may dominate the technology conversation, but their success ultimately depends on something far more fundamental: the quality, accessibility and governance of the data beneath them. Before asking what AI can do for our business, we need to first ask whether our data is ready for AI?

This session will look beneath the AI layer at how firms can build the data foundations required to make AI useful, scalable and safe, including:

- Connecting client, adviser, platform, CRM, finance, compliance and third-party data without necessarily replacing existing systems.
- Establishing ownership, stewardship, validation, lineage and monitoring so firms can trust the information on which AI is acting.
- Moving beyond disconnected applications and manual rekeying towards APIs, bi-directional integrations and more effective data architecture.
- Understanding where data originates, who owns it, how it changes and whether it remains appropriate for each AI use case.
- Ensuring data can support Consumer Duty outcomes monitoring, regulatory reporting and increasingly proactive, risk-led supervision.
- Using continuous monitoring, predictive indicators and actionable MI to improve decision-making rather than simply reporting what has already happened.
- Connecting data, technology, AI, people and governance to drive efficiency, stronger regulatory evidence and better client outcomes.

Expert: Chris Davies, CEO and founder, Model Office-MO®

4. Connected by design - the technology ecosystem that evolves with your business

Most wealth firms cannot replace their technology stack overnight. The challenge is creating an architecture that allows firms to innovate continuously without rebuilding from scratch every time a new technology emerges.

This session will explore:

- Making existing platforms work harder
- Building API-first technology ecosystems
- Integrating AI into existing infrastructure
- Designing technology for long-term adaptability

Expert: Hiten Gundecha, Senior Sales Engineer, FA Solutions

5. Who owns the AI decision? Governance, accountability and the new operational risk

As AI moves from experimentation into everyday processes, firms face a new challenge: determining who is responsible when AI influences a decision, generates an output or takes an action. The

greater the autonomy of AI and Agentic AI, the more important clear governance, human oversight and accountability become.

This session will explore how firms can scale AI without losing control, including:

- Establishing ownership and accountability for AI across technology, operations, compliance and the business.
- Determining which decisions AI can support, which it can make and where human intervention must remain.
- Creating appropriate approval, testing and monitoring frameworks for new AI use cases.
- Managing third-party AI, model and technology-provider risk.
- Understanding explainability, audit trails and evidencing how AI-assisted decisions were reached.
- Identifying and managing bias, hallucination, data leakage and unintended outcomes.
- Preparing governance for Agentic AI as systems move from generating information towards taking actions.
- Creating guardrails that enable innovation without allowing governance to become a barrier to adoption.

6. Digital resilience - managing risk in an increasingly connected world

As wealth firms become more dependent on technology, data and third-party providers, and as digital ecosystems grow more complex, operational resilience is becoming a strategic priority. Firms must balance innovation with strong governance, security, and risk management to safeguard operations and client trust.

This session will explore:

- Balancing innovation and digital transformation with governance and controls
- Building trust in digital operating models
- Managing the opportunities and risks associated with AI adoption and automation
- Protecting sensitive client and business data while enabling greater digital collaboration

Expert: Steve Bomberger, Head of SEI Sphere, SEI

YOUR BUSINESS

7. Rethinking organic growth - what it takes to scale in today's hypercompetitive market

Organic growth is becoming harder, more expensive, and less predictable. The pool of high-value clients is limited, acquisition costs are rising, and traditional channels, particularly referrals, are no longer sufficient to support ambitious growth targets.

As competition intensifies, growth is no longer just a commercial question, but a strategic one - with implications for operating model design and long-term firm value.

This session will explore how growth dynamics are shifting and how leadership teams are responding, by asking:

- Why is organic growth becoming structurally harder?

- How are rising acquisition costs reshaping growth strategy and ROI expectations?
- How growth strategies impact enterprise value, exit readiness, and business resilience
- What structural changes are required to deliver scalable, repeatable growth?

Expert: Tim Grimsditch, Managing Director, Unbiased

8. Beyond the AI hype – the productivity equation for modern advice firms

AI investment is accelerating across wealth management, but adoption does not automatically translate into greater productivity. As firms move beyond experimentation, the challenge is determining where AI is genuinely creating capacity, where it is simply adding another layer of technology, and what needs to change in the operating model to turn innovation into measurable value.

This session will explore:

- Where firms are losing the most capacity today – and whether AI is addressing the right problems
- Which activities should be eliminated or redesigned rather than automated
- Which AI use cases are delivering measurable productivity gains in practice
- How workflows and roles need to change to capture the benefits of AI
- How firms should measure AI productivity beyond hours saved
- Whether AI can genuinely enable firms to scale without increasing headcount

Expert: Jonny Rayner, Principle Solutions Consultant, Dynamic Planner

9. Integration after consolidation - turning scale into value

Consolidation continues to reshape wealth management, but scale does not automatically create efficiency. The challenge is turning acquired businesses into integrated, scalable organisations.

This session will explore:

- Why integration remains one of the biggest barriers to value creation
- Harmonising systems, processes and data after acquisition
- Protecting culture and client experience through change
- Capturing operational efficiencies without increasing complexity
- Moving from acquisition-led growth to transformation-led growth

Expert: Karl Cranswick, Partner, Solve

10. Transformation fatigue - How much change can firms absorb?

Transformation is now constant, but competing priorities, regulation and technology programmes are putting pressure on organisations' ability to deliver change effectively.

This session will explore:

- How firms prioritise competing transformation demands

- When change becomes an operational risk
- Improving adoption and engagement
- Sequencing transformation effectively
- Building organisations that can continuously adapt

Expert: Brian Moffat, FinTech Adoption Specialist, Origo Services Ltd

YOUR CLIENTS

11. Fixing the onboarding problem – can KYC finally become frictionless?

Client onboarding remains one of the most persistent sources of friction for wealth managers, creating duplication for clients, manual work for employees and unnecessary operational cost. With KYC automation now a significant technology investment priority, firms have an opportunity to rethink the process rather than simply digitise existing inefficiencies.

This session will explore how firms can create faster, safer and more joined-up onboarding, including:

- Eliminating duplication across KYC, AML, suitability and client data collection
- Automating manual processes without weakening oversight or introducing new risks
- Connecting onboarding across advisers, operations, compliance, platforms and third parties
- Creating reusable client data rather than repeatedly requesting the same information
- Balancing regulatory evidence requirements with a simpler client experience
- Identifying where digital identity, APIs, automation and AI can genuinely remove friction
- Measuring whether onboarding transformation is delivering improvements in cost, speed and client outcomes

12. The future of client experience – personalisation without losing the human touch

Client expectations are changing, but the fundamentals remain the same; trust, strong relationships and quality service. As technology and data create new opportunities to personalise and automate the client experience, how can firms use them to become more relevant and responsive without losing the human connection?

This session will explore:

- What tomorrow's clients will expect – and what they will continue to value
- Moving beyond traditional segmentation to genuinely understanding clients
- Using data and technology to personalise experiences at scale
- Balancing digital convenience and automation with human relationships
- Creating consistent, high-quality experiences across channels and generations
- How firms can turn better client understanding into stronger relationships and outcomes

13. Digital trust - protecting confidence in a changing advice model

Trust remains the foundation of advice, but digital transformation is changing how trust is built, maintained and protected. Firms must ensure technology strengthens rather than weakens relationships.

This session will explore:

- How trust changes in digital relationships
- Creating transparency around technology-enabled advice
- Protecting clients from emerging digital risks
- Maintaining confidence as automation increases
- Designing technology around client reassurance

YOU & YOUR PEOPLE

14. The human advantage – building the workforce of 2030

As technology takes on more tasks, the role of people across wealth management is changing. The opportunity is not simply to automate existing roles, but to rethink where humans create the greatest value and build the skills, cultures and operating models needed for the future.

This session will explore:

- What humans will bring that technology cannot – from judgement and empathy to creativity and relationships
- How roles will evolve as automation takes on more routine tasks
- Which skills and capabilities will become increasingly valuable
- How firms can redesign roles around technology rather than simply automate existing processes
- Reskilling teams and developing future leaders for a more digital workforce
- Creating cultures that embrace technology while keeping people at the centre of transformation
- Finding the right balance between technological capability and human judgement
- Whether firms are preparing their people for the workforce they will need in 2030