WealthTech Matters – Spring 2026

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 **Caroline Deutsch**, Head of SEI Marketing EMEA Region, 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	**TechTalk 1**	**Modern wealth firms have changed. Cybersecurity hasn't.** With **Iain Gibbons,** Managing Director of FoxTech
		TechTalk 2	**Let our data tell the story.** With **Nicky Sevel,** Co-founder of Woven Advice
Breakout rooms	1000-1100	**Roundtable Session**	*Data, AI and the future of advice* *Redefining productivity by removing the wrong behaviour* *Winning tomorrow's clients without losing today's* *Are wealth managers making better decisions?* *Why organic growth is breaking and what it now takes to scale?*
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**	*The data problem no one has solved* *Whose data is it anyway?* *Why wealth management firms are becoming harder to run* *How much transformation can firms absorb?* *Why organic growth is breaking and what it now takes to scale?*
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**	*Data, AI and the future of advice - can firms scale without losing control?* *Redesigning roles as automation, AI and outsourcing reshape work* *The role of behavioural data in client outcomes* *Why wealth management firms are becoming harder to run*
King of Prussia	1510-1540	**Keynote Presentation**	**Trust, Empathy & Judgement: The past and future of financial planning.** With **Rohit Vaish**, CFA, President & Founder, Saturn
Foyer	1540-1630	**Fizz & farewell**	Join us for a glass of fizz before heading back to the office or home

WEALTHTECH MATTERS

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CONTENTS

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 unstructured and AI-generated data are stretching existing data ownership and governance frameworks
- The important role that data has in the effectiveness of AI and quality outputs
- Where accountability for data quality, control and outcomes should sit between the COO and CDO

Expert: Sally Purcell, Senior Consultant, Solve

2. Whose data is it anyway? Data as infrastructure, not an asset

Data quality is often cited as the limiting factor for AI adoption, productivity, regulatory reporting and client outcomes. Yet despite sustained investment in data programmes, many firms still struggle with fragmented systems, inconsistent data and limited control over how information moves across their technology stack.

This session will explore data not as a strategic asset in theory, but as operational infrastructure in practice – and what it takes to make it reliable, usable and efficient across day-to-day operations.

The discussion will focus on:

- Who truly owns data quality and decision-making today – and where accountability should realistically sit
- Why fragmented systems and disconnected data continue to create operational friction rather than efficiency
- How firms can design technology stacks that maintain a consistent and trusted view of client data
- How firms can move towards a single, consistent view of client data across multiple systems

Expert: David Ferguson, Executive Chairman, Seccl

3. Are wealth managers making better decisions? Why better data is not leading to better decision making

Data-driven decisioning is rapidly becoming a strategic priority for wealth firms, driven by regulatory pressure, cost challenges, and the need for more consistent client outcomes. Yet despite significant investment in data platforms, reporting, and analytics, many firms are still struggling to translate insight into action.

This session will explore what is driving the shift towards data-led decision-making - and why progress in practice remains uneven. The discussion will focus on:

- Where decision-making still breaks down despite improved data availability
- Why dashboards and reporting often fail to change behaviour or outcomes
- How leading firms are embedding data into frontline and operational decision processes
- What changes are required in governance, incentives and operating models to enable faster, more consistent decision-making

Expert: Multrees

4. Data, AI and the future of advice: Can firms scale without losing control?

The same infrastructure required to deliver Consumer Duty compliance could also unlock the next era of advisory scale and accessibility. As wealth managers invest in AI-driven analytics and personalisation, the opportunity is clear: deliver high-quality, data-driven advice to segments that traditional models have struggled to serve.

However, as firms move from ambition to execution, many are finding that AI is exposing underlying challenges in data quality, integration and governance - limiting its impact in practice.

This session will explore both the opportunity and the reality, examining how firms are connecting and standardising client data to support more scalable advice models, while maintaining control, trust and regulatory confidence.

The discussion will focus on:

- Which AI use cases are delivering measurable value today - and where firms are struggling to move beyond pilots
- How Consumer Duty is reshaping the commercial case for data and technology investment
- What "scalable, compliant personalisation" looks like in real advisory models
- Where poor data quality, fragmented systems and weak governance are limiting outcomes
- How firms are balancing innovation with control, explainability and client trust

Expert: Flanks

YOUR BUSINESS

5. Why wealth management firms are becoming harder to run

As firms scale, growing complexity across systems, data, vendors, products, and geographies is increasingly driving higher cost, control challenges, and inconsistent client outcomes. Scaling without addressing complexity will become critical operating challenge and influence organic growth.

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?

Expert: Michael Feeley, Chief Operating Officer, SEI

6. Why organic growth is breaking - and what it now takes to scale

Organic growth in wealth management is becoming structurally harder. The pool of high-value clients is limited and increasingly contested, acquisition costs are rising, and traditional growth channels - particularly referrals - are no longer sufficient to support ambitious growth targets.

At the same time, firms are discovering that growth is no longer just a commercial challenge, but an operating model one. Conversion rates, response times, lead handling processes and adviser behaviour are now critical determinants of success.

This session will explore what is really driving the shift in growth dynamics - and how firms are responding in practice. The discussion will focus on:

- Why the addressable market for high-value clients is more constrained than firms assume
- How rising acquisition costs are changing the economics of growth and ROI expectations
- Why referrals, while effective, are no longer scalable enough to support growth targets
- Where growth is breaking down in practice - from lead response times to conversion processes
- How leading firms are redesigning operating models (centralised teams, SLAs, data-led conversion) to enable scalable growth
- What role AI, digital channels and changing client behaviour are playing in reshaping acquisition strategies

Expert: Unbiased

7. 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

YOUR CLIENTS

8. The role of behavioural data in client outcomes

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

9. 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

10. 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?

11. 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?