WEALTHTECH MATTERS

THURSDAY 24 SEPTEMBER 2020 – VIRTUALLY	
SCHEDULE	
0800-0830	**Virtual coffee and networking:** An opportunity to network over coffee (and homemade croissants - "home" being the key word here) in small curated groups or one to ones (via Zoom rooms). You will have been invited to make your meeting choices and they will be visible in your personalised itinerary. We will ensure you know what to do!
0830-0845	**Keynote:** Welcome and setting the scene incorporating the outputs of the research carried out in the run up to the day. *James Goad, Joint Managing Director, Owen James*
0845-0910	**Keynote: Work, as both a place and an activity, has changed. What does the future look like?** *Philip Ross, CEO and Founder of Unwork*
ROUNDTABLES 0915-1015	**A supersonic digital masterclass - well that is how it felt when we entered lockdown. So now that the mindset has changed what comes next? New service models and personalisation at scale is the future name of the game.** ▪ At recent events, our delegates have been encouraged to become more digital as a way to achieve greater productivity, adapt to changing clients' needs and prepare for the NextGen. ▪ Well all that choice and procrastination went out of the window and we all went through a programme of digital masterclasses in remote interaction in the space of a few weeks. And what's more – so did our clients. All that stuff about researching clients and ensuring what you were delivering was being valued … that also went out of the proverbial window. Needs must! ▪ For a long time, we have thought that relationship management is best carried out face to face. However, our original fear has been flipped. Indeed, there is a new level of interaction. By inviting people into private environments, it changes the traditional face to face relationship. ▪ The key is what comes next. The mindset has changed and we are likely to move to new hybrid models of face to face adviser and machine interaction models. We need to bottle this innovative mindset and ensure we are doing it right. ▪ Personalisation at scale is the future name of the game. *Expert: Ian Woodhouse, Head of Strategy and Change, Orbium*
	Cost efficient goal-based planning advice for all of your clients ▪ Why is it important for wealth managers to offer clients a high quality, client-centric financial planning service? What does the future of financial planning look like? ▪ How do you become THE wealth coach for your clients? What does goal-based planning bring to the wealth manager, adviser and most importantly the client? ▪ Is this approach affordable and feasible for a wealth manager? We will tackle some challenges and share best practices in this round table. *Expert: Iwan Schafthuizen, Managing Director Business Development, Ortec Finance*
	Let's talk Dashboards ▪ As we move to a world where relationship managers/financial advisers may well be talking to their clients on line rather than in person, they will need fast access to client data. ▪ There will also be a more urgent need to have client data stored on one central platform.

	▪ While in the past wealth advisers have tended to use a number of different niche applications, now it is all about finding comprehensive, consolidated solutions that really do it all. *Expert: Antony Bream, Managing Director UK & Americas, Wealth Dynamix*
1015-1035	**Get with the programme!** An opportunity for you to catch up on emails – grab a coffee or a "pick yourself up" smoothie – do a HIIT workout. OR stick with us and watch **Companies in Motion** who will teach you in a ten-minute video how to **'Power your performance with physical intelligence. Achieve more, stress less, live and work more happily.'** Could prove useful.
ROUNDTABLES 1035-1135	**Open Banking and now Open Finance** • Open banking has failed to take off despite obvious advantages of increased transparency and digital control. • But the FCA is now consulting on expanding the concept to a huge range of financial services including investments and pensions. • So why are they the two best kept secrets within financial services? • And what truly are the brakes on innovation in the area? • This roundtable will discuss the possibilities, opportunities and barriers around the industry. *Expert: David Barks, Director Wealth, Savanta*
	The Future Wealth Adviser ▪ What are your advisers' biggest challenges? ▪ How are you reducing advisers' administrative workload through technology? ▪ How are you supporting advisers to grow revenue through technology? ▪ What will the future adviser look like and what new technologies will enable them to succeed? *Hosted by Wealth Dynamix with the discussion led by Ian Woodhouse, Head of Strategy and Change, Orbium*
1140-1200	**Keynote: Behavioural Finance – dynamic suitability at speed and under stress.** *Speaker: Greg B Davies, Head of Behavioural Finance at Oxford Risk*
1200-1215	**Keynote: The WealthTech landscape for the UK Wealth Management Industry.** *Speaker: Stephen Wall, Co-founder and Head of Marketplace & Content for The Wealth Mosaic* will share the highlights from their imminent report capturing data on some 700+ fintech companies. The full report will be published in early October – so get ahead!
	Thank you and wave goodbye!