

Swiss WealthTech Live 2024

CONFERENCE

February 6th, 2024 at 8:30 am (CET)
SIX ConventionPoint, 110 Pfingstweidstrasse, 8005 Zürich, Switzerland



Time	Session
8:30 – 9:00	Breakfast and Registration
09:00 – 9:05	Welcome to Swiss WealthTech Live 2024 Introduction to the day, its agenda, and what to expect.
09:05 – 9:25	Introduction to the Swiss WealthTech Landscape Report 2024 A quick introduction to our fourth Swiss WealthTech Landscape Report, its highlights, themes, contributors and this year's Solution Provider Directory overview and highlights, plus an overview of global trends and themes in technology across the wealth management sector. What's hot, what's new, and what themes do we see across the marketplace? Stephen will provide the overview for Switzerland and beyond.
09:25 – 09:50	Keynote: A Deep Dive into Generative AI Roy Kirby, Head Corporate Actions, Reference & Pricing at SIX will present on Generative AI and what SIX has learned so far, covering Data Mining, LLMs, the regulatory landscape in Switzerland and Europe, new APIs, and how SIX's offering, a SaaS trade surveillance tool, uses AI to monitor unusual trade patterns to support compliance towards market abuse requirements, and much more.
09:50 – 10:35	Panel: The Leaders' View Our first panel discussion of day, The Leaders' View, hosted by Arash Sorouchyari and featuring panellists; Dr. Damian Zech, Chairman of the Board, Quintet Private Bank, Elie Yazbeck, Head of Digital Wealth Management, Managing Director, Julius Baer, Fabian Käslin, CEO, Banque Havilland Liechtenstein & Switzerland and Roger Furrer, Director, ERI. They will focus on how wealth management executives/leaders manage and get the most out of the technology tools/people/opportunities in their businesses, and how organisations can use technology to become/support their wealth management sector leadership goals.
10:35 – 11:00	Coffee and Networking Break
11:00 – 11:30	Fireside Chat: A Discussion on Innovation A fireside chat between Nelson Wootton, CEO & Co-Founder of UK-based cloud native core banking engine SaaScaDa, and Raphael Bianchi, Senior Partner, Co-CEO Synpulse8 and Head Retail Banking at Synpulse. The two will discuss how wealth management organisation can delivering innovation for multi-generational wealth holders, tackling innovation and development opportunities through the application of modern technology while maintaining and developing the existing business.
11:30 – 11:55	Interview: Powering Sustainable Investment Decisions in Finance An interview with Fredrik Daveus, CEO & Co-Founder of Kidbrooke on how smart data management is key to improving the efficiency of ESG reporting. The interview will explore how smart data management can make all this information more relevant, the real-life challenges faced by customers of Kidbrooke, and the importance of sustainability reporting and broader analytics capabilities working well together.
12:00 – 13:00	Buffet Lunch and network with peers
13:00 – 13:45	Panel: Building a Digital Wealth Manager A new form of wealth management organisation has come to market, technology-first, targeting a new breed of clients, built with a different mindset to their traditional peers. But how to build a digital wealth manager? This panel includes; Alexandra Lau, Head of Corporate Development & Sustainability at BLKB, investor in radicant, Switzerland's first digital sustainability bank, Tillmann Lang, CEO & Co-Founder of Invoya Impact Investing, Marion Fogli, Deputy CEO of Alpien and Mark Bagnall, COO of figg. They will discuss how to build a digital wealth manager considering elements such as clients and their demands, products and services, technology options, branding and client acquisition, people, culture and leadership, and more. What is the mix that delivers success?
13:45 – 14:35	Panel: The EAM, Custodian Bank, Technology & Ecosystems – Redefining the Model A mainstay over the last 20 to thirty years of a relatively stable Swiss wealth management sector, the external asset management (EAM) model is now being forced to adapt to a new market environment. Hosted by Dimitri Petruschenko from EAM.Technology, this panel will be in Swiss German and look at the role of technology and ecosystem to enhance the EAM model for the EAM, bank custodians and, ultimately, the end client. Panellists include; Jamie Vrijhof-Droese, CEO & Board Member from WHVP, Doron Bollag, COO & Managing Partner at Tareno, Sonja Schürch, Business Technology Solutions

	Expert at ZKB, Anthony Gimigliano, Director, Head Institutional Business, Swissquote and Simon Alioth, Managing Director, Synpulse8; Executive Vice President, OpenWealth Association.
14:35 – 15:00	Coffee and Networking Break
15:00 – 15:45	Panel: Adapting to the World of Enhanced Client Experience The world around us has changed and the expectations of the industry's clients, influenced by new digital experiences, has changed significantly too. In wealth management, the path to revolutionizing client experience lies in five fundamental cornerstones. This panel will highlight and introduce five key elements of the of the modern client experience, each introduced by a different panelist, and be followed by a discussion among the five panellists on the topic.
15:45 – 16:15	The Pitching Hour One hour for five live demo/pitches showcasing a range of technology offerings available to wealth managers in Switzerland and beyond. Every pitch has seven minutes to showcase their offering and up to three minutes to answer questions.
16:15 – 16:35	Coffee and Networking Break
16:35 – 17:15	Panel: The Future View Let's look into the future. The final panel of the day will look into what the future holds for the Swiss and broader wealth management landscape and what the role of technology will be in delivering, enabling, challenging and disrupting that. Whether the client, products and services, staff, business models, the technology involved and coming, the panel will paint a vision of the future and, importantly, what that means for the sector today.
17:15 – 17:30	It's a Wrap – Concluding comments, what's next and thank you