

Schedule of the Day						
Terrace	0830-0900	Breakfast	Informal networking over breakfast			
Main room	0900-0920	Welcome	Scene Setter Findings. With Stephen Wall , Co-Founder, The Wealth Mosaic			
Main room	0920-0940	Tech Talk 1	Uncharted Territory - Portfolio visualisation in a new light. With Adám Fáth , Senior Business Development Manager, Dorsum Investments			
		Tech Talk 2	Unlocking Value Through Digital Cross-Border Compliance in Wealth and Asset Management. With Daljit Boora, Droit Wealth Business Development Lead and Charlotte Keens, Droit Wealth Product Owner, Droit			
Breakout rooms	0945-1045	Roundtable Session	<table border="0"> <tr> <td><i>Research Driven - How to use Machine Learning and GenAI to drive investment recommendations</i></td> <td><i>Value Adding – Adapting to the world of enhanced client experience</i></td> <td><i>Informed Decisions – The platforms and services that make the biggest impact</i></td> </tr> </table>	<i>Research Driven - How to use Machine Learning and GenAI to drive investment recommendations</i>	<i>Value Adding – Adapting to the world of enhanced client experience</i>	<i>Informed Decisions – The platforms and services that make the biggest impact</i>
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Terrace	1045-1105	Morning Coffee	Grab a refreshment and catch up with your peers			
Main room	1105-1135	Networking	Structured networking - an opportunity to meet some new faces			
Main room	1140-1210	Keynote Presentation	Success Solutions – Leveraging AI to accelerate growth opportunities and operational efficiencies in financial services. With Tobi Kaymak , Data Analytics Specialist, Google Cloud Switzerland			
Breakout rooms	1215-1315	Roundtable Session	<table border="0"> <tr> <td><i>Research Driven - How to use Machine Learning and AI to drive investment recommendations</i></td> <td><i>Sustainable Solutions – Responding to the evolving client behaviours and values</i></td> <td><i>Partnership Potential - Innovating without compromising reputation</i></td> </tr> </table>	<i>Research Driven - How to use Machine Learning and AI to drive investment recommendations</i>	<i>Sustainable Solutions – Responding to the evolving client behaviours and values</i>	<i>Partnership Potential - Innovating without compromising reputation</i>
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Main room	1320-1350	Keynote Presentation	The Case for Behavioural Finance – How to put the story on data to make less mistakes and better decisions with the right narrative. With Professor Enrico De Giorgi , Yainvest co-founder			
Terrace	1350-1500	Buffet Lunch and drinks	Network with peers over lunch and a glass of fizz			
Terrace	1500	Thank you & farewell	We wish you a safe trip back to the office or home			

WealthTech Matters Switzerland

14 November 2023, Google Europaallee 24, 8004 Zürich, Switzerland

This agenda highlights the key technology areas for wealth tech implementation within the context of the Swiss Wealth Management sector, presented in the following nine roundtable sessions:

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2. Sustainable Solutions – Responding to evolving client behaviours and values..... 1
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5. Partnership Potential - Innovating without compromising reputation 3

1. Value Adding – Adapting to the world of enhanced client experience

Client expectations have evolved dramatically, with customers now demanding more diversity and flexibility when it comes to their portfolios. They also expect access to self-service tools to customise investments based on their own priorities and risk appetite.

Tailoring the digital experience to meet individual client preferences and needs is therefore becoming crucial. And by offloading or automating certain tasks, relationship managers can dedicate more time and energy to activities that directly add value to their clients, such as strategic planning, financial advisory services, goal setting, customised investment strategies and proactively addressing clients' evolving needs.

So how does the relationship manager need to adapt for this brave new world, and what exactly are the tasks that can be replaced?

This session will address how to source and implement digital tools that will deliver value-added services which enhance client satisfaction, strengthens relationships and increases client retention, in particular:

- How the relationship manager can be more efficient and create more value in a world of enhanced client experience
- How to leverage digital platforms and technology tools to streamline processes such as portfolio tracking and communication

2. Sustainable Solutions – Responding to evolving client behaviours and values

Whether related to product, service, delivery, pricing, culture, people, technology or another aspect of the wealth management experience, the modern wealth management client has a different set of expectations to their wealth manager. If those expectations are not understood, or worse not met, then those clients are at risk of going elsewhere to find a provider that does meet their expectations.

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There is also a growing segment of wealthy people with large assets coming to the fore, which is opening up new opportunities for participation - Generation Z, who have different values, preferences and behaviours, particularly when it comes to sustainability.

This trend of changing customer behaviour will escalate even further when Generation Z inherit the wealth of their boomer grandparents (which is coming too late for their Generation X parents).

However, many Swiss Wealth Management are carrying on with 'business as usual' even as client demands change so rapidly. This session will therefore address;

- The biggest challenges when it comes to differentiating in a competitive market, including the reliance on legacy systems that are not integrated with modern digital technologies
- What the wealth transfer means for wealth management firms and how to meet the changing nature of HNW client expectations
- What are the digital techniques to better segment the client and what kind of changes are coming down the tracks?

3. Informed Decisions – The platforms and services that make the biggest impact

Technical inventions are rapidly transforming the wealth management industry and the way services are delivered, with the biggest impact being the democratisation of access to platforms or services, which are now in competition with banks.

From robo-advisory platforms that leverage algorithms to provide automated investment advice and portfolio management, to Artificial Intelligence (AI) and Machine Learning (ML) technologies, which make informed investment decisions and recommendations, services are now more accessible, personalised, efficient and cost-effective.

This session will take a look at;

- How Swiss wealth managers can access and implement the digital platforms which increase convenience and accessibility for clients, as well as leverage the cost-savings and efficiencies
- How the digital offering means you can grow with your client base

4. Research Driven - How to use Machine Learning and Generative AI to drive investment recommendations at scale

Big data and AI represent the future of the financial industry, and those who embrace these technologies strategically will receive a competitive advantage by ensuring long-term relevance and success in the rapidly evolving financial landscape.

Big data analytics tools and techniques allow wealth managers to analyse large datasets to extract insights, identify patterns, and make data-driven decisions. By leveraging big data, wealth managers can gain a deeper understanding of client behaviour, market trends and risk factors, enabling more informed investment strategies.

This session will explore:

- Data, AI and the Cambrian Explosion

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- From House View to Recommended for You – How AI can help
- How to embed AI in a highly regulated environment like investing

Expert: Investcloud

5. Partnership Potential - Innovating without compromising reputation

Swiss wealth management firms have built their reputation on providing personalised, high-touch service to clients, which can make adopting new technologies that could compromise this service more risky - particularly if the innovation is perceived to be a potential disruptor to the client-adviser relationship, which relies on trust and the human touch.

This session will discuss:

- How to get new technologies and processes approved when the potential return on investment is not considered substantial or immediate
- How partnerships with FinTech firms can reduce exposure for clients