

WEALTHTECH MATTERS

Taking place virtually:

THE CLIENT

Tuesday 10
March
2020

THE ADVISER

Thursday 24
September
2020

Owen James and The Wealth Mosaic have collaborated to create a series of triannual events for key decision makers from the Private Wealth industry. Each will be themed and will discover and discuss technology solutions that solve key challenges facing their business.

**THE
BUSINESS**
Wednesday 11
November
2020

WHO WILL BE ONLINE?..

Each event will bring together 50 COOs, CTOs, CIOs and their teams from the top Wealth Managers, Private Banks, DFMs, Advisers and MFOs.

THEMES:

The Client

How you find and engage prospects, onboard, manage and service clients efficiently and profitably is changing. Learn what technology tools are doing in these areas.

The Adviser/Employee

A wide range of technology now exists to increase the efficiency, speed and effectiveness of your employees. Learn what technology tools can do for your employees.

Your Business

Wealth Management firms are challenged by multiple themes but also have significant opportunities available to them. Learn what role technology has to play here.

SPONSORSHIP BENEFITS:

- Brand awareness
- Networking
- Present to participants
- Participant Data
- Buyer needs and considerations

WHAT DOES IS COST?

There are various sponsorship packages available and they start from:

■ TED Talk Sponsor:	£3,000 +VAT
■ Roundtable Sponsor:	£3,000 +VAT
■ Keynote Speaker:	£5,000 +VAT
■ Headline Sponsor:	£10,000 +VAT

Get in touch!



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NOT JUST AN EVENT

The different sponsorship packages include the following benefits:

BENEFIT	NETWORKER	PANEL OR TED TALK SPONSOR	KEYNOTE SPEAKER	HEADLINE SPONSOR
Access to event app	✓	✓	✓	✓
Branding on event webpage & emails	✓	✓	✓	✓
Participant contact details	✓	✓	✓	✓
Quantitative and qualitative pre-event research and data	✓	✓	✓	✓
Branding on the main stage		✓	✓	✓
Pre-arranged one to ones	✓			✓
Host and lead a roundtable discussion				✓
Opportunity to be a Panel Member or run a TED Talk		✓		✓
Present opening or closing address			✓	✓
Video interview session				✓
Recorded content		✓	✓	✓
Inclusion in social media posts	✓	✓	✓	✓
Content included in online libraries		✓	✓	✓
Inducement busting	✓	✓	✓	✓

HOW WILL THE EVENT BE STRUCTURED?

All events will be formatted in broadly the same way, the agenda below is an example itinerary.

WealthTech Matters - The Client	
TIME	DETAILS
09:00 AM	Welcome and registration
09:10 AM	Introduction and Opening Keynote Presentation - An insight into the current market
09:40 AM	Panel Discussion - Discover, engage and win the client
10:10 AM	TED Talk
10:40 AM	Coffee Break
11:00 AM	Panel Discussion - Understand, serve and delight the client
11:30 AM	TED Talk
12:00 PM	Closing Address - A vision of the future
12:30 PM	Lunch & networking
01:30 PM	Wave goodbye

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Panel discussions and themes for the event will include:

Discover, engage & win the client - Taking a look at technologies and technology themes that support wealth managers to enhance their process to discover, engage and win clients.

Understand, serve & delight the client - A look at technologies and technology themes that help wealth managers to better understand, serve and, ultimately, delight their clients.

Manage and enhance the client life-cycle - Consider how technology can support and improve the client life-cycle and how WMs can benefit from this process.

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