

Thursday 4 July 2024, One Moorgate Place, London, EC2R 6EA

Schedule of the Day

Main reception	0815-0900	Registration & Breakfast	Informal networking over breakfast		
Great Hall	0900-0920	Welcome Keynote	Scene Setter Findings. With James Goad , Managing Director, Owen James		
Great Hall	0925-0955	TechTalk 1	Reimagining the financial services value chain. With Yann Kudelski, Head of Strategy and Marketing, additiv		
		TechTalk 2	Putting professional digital development in the spotlight. With Phil Newton, Commercial Director, Redmill Advance		
		TechTalk 3	Suitability and Advice: Protecting clients and optimising their experience. With Alessandro Tonchia, Head of Strategy, InvestCloud Europe and Asia		
Breakout rooms	1000-1105	Roundtable Session	<i>Productivity Push – How technology can help advisers add value</i>	<i>Empowering teams through next-generation technologies</i>	<i>Navigating Volatility - Leveraging technology to build trust and loyalty</i>
Main reception	1105-1125	Coffee Break	Grab a refreshment and catch up with your peers		
Breakout rooms	1130-1235	Roundtable Session	<i>Unlocking Efficiency - Harnessing AI for streamlined adviser workflows</i>	<i>Change Request - Cultivating a culture of innovation and adaptation</i>	<i>Relationship Advice – Evolving without sacrificing the human connection</i>
Great Hall	1240-1310	Keynote Presentation	Empathic AI - Are we heading towards a post-app future? Kate Ancketill , CEO of business futurist consultancy GDR will explore the latest consumer-facing AI and its impact on consumer behaviour		
Main reception	1310-1430	Buffet Lunch	Discuss the day over lunch with your peers		
The Globe	1430-1700	Thank you & fizz	Do join everyone for a post-event drink and networking		

WEALTHTECH MATTERS - THE ADVISER

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1. Navigating Volatility - Leveraging technology to build trust and loyalty

Trust is one of the key reasons why clients continue with their advisers, and in turn, enhancing trust is critical to maximising the client's satisfaction.

However, we are in a time of volatility and falling loyalty levels with clients worrying more than ever about their investments, which means the quality and timeliness of advice now needs to exceed client expectations.

This session will discuss how the adviser can use technology for this, including:

- Data analytics for more consistent communications, tailored to personal interactions
- How to demonstrate the adviser's capability aligned with client preferences and values

Expert: Divakar Padmanathan, Director, Alpha FMC

2. Productivity Push – How technology can help advisers add value

In a time of rising cost-income ratios, driving productivity relies more and more on leveraging technology for efficiency. But there is still a lot of confusion among financial advisers about what AI is, with only some presently using it.

For those who have embraced it, and those who have yet to start, this session will look at the technology and tools that advisers can use to benefit clients in the following core areas:

- Customer journeys, products and services, risk management and portfolios
- New opportunities in the CIP space for greater control of your investment approach and client solutions
- The power of AI to add value to your investment proposition and the overall client experience

Expert: Patrick Jones, Sales Director, Collidr

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3. Empowering Teams through Next-Generation Technologies – How AI, the latest tech platforms and tools can transform your operating model

A focused overview of current operational challenges, the role of innovative technologies in addressing these challenges, and how to implement with a phased approach to augment human capabilities rather than replace jobs.

This session will provide practical strategies to empower their teams and drive efficiency and growth within their organisations through the discussion of:

- Current challenges being faced when it comes to operational processes that take away from value-adding activities
- How to leverage innovative technologies to help streamline operations and empower your team to drive growth
- Strategies to implement next-generation technology using a phased approach to empower teams to focus on value-add tasks

Expert: Matthew Baldwin, Lead Field Sales Executive, SS&C Technologies

4. Unlocking Efficiency - Harnessing AI for streamlined adviser workflows

For today's advisers, time-saving reductions in workload are becoming increasingly necessary in order to provide the personalised services that clients now expect. However, around two-thirds of an adviser's time is still spent on non-client interactions.

This session will discuss how AI is rapidly moving from 'nice to have' to 'must have' in order to release advisers from the administrative tasks which slow them down, including:

- The value of AI for reducing adviser's time spent on the fact-finding and client-reporting processes
- Identifying where bottlenecks are appearing in order to apply further automation to that particular part of a process

Expert: Craig Barraclough, Director, Finovation Consulting

5. Relationship Advice – Evolving without sacrificing the human connection

Automating core processes in order that the adviser can focus on the relationship is important, but if clients become too comfortable with the digital advice services available, could this risk rendering the adviser extinct?

This session will ask whether a deconstruction exercise is needed to determine what the technology can and cannot do, and where the limitations reside to ensure that the client does not choose to rely solely on digital advice, as well as:

- How the adviser will need to change and evolve in order to meet a new demographic of clients who want to engage in a more digitally enhanced environment

Expert: Ben Wright, Chief Innovation Officer & Director of Progress, Melo

6. Change Request - Cultivating a culture of innovation and adaptation

New technology involves implementing new processes, and often requires new people who have the required skills to manage this. And as the number of younger clients increases, it will become more necessary to find advisers who are compatible with the technology they will demand.

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This session will discuss the challenge the industry is facing with the decline in younger advisers in order to meet this demand and how a cultural shift will be needed to embrace change and adopt new ways of working, including:

- Providing the right leadership culture to empower and enable existing employees

Expert: Eric Sharrad, Senior Recruitment Consultant, Pavilion Recruitment