SESSIONS

PLEASE NOTE THIS IS THE 2019 AGENDA. THE 2020 AGENDA WILL BE RELEASED IN DUE COURSE.
DAY 1 MAIN CONFERENCE - 10/09/2019

Registration, Coffee and Pastries

08:30 - 09:05

Opening Remarks & Welcome

09:05 - 09:15

Participants

Katie Derham - Broadcaster, BBC

Opening Keynote: Global Trends and Innovations in Digital Wealth

09:15 - 09:45

Participants

Devie Mohan - CEO & Co-Founder, Burnmark

Financial Inclusion

09:45 - 10:30

From tap to spend to tap to invest. Learn how micro-investing and a new generation of personal financial management apps have the capacity to offer access, increase adoption and improve financial wellness.

- Why don't we save and invest enough and how do you make people take action?
- Why are round-ups, personal goals and saving vaults effective in attracting customers?
- Are referrals, affinity programmes and rewards pivotal to growth?
- How are you using data to understand individual customers behaviour?
- What are the views on fees and tiered pricing for different service levels?

Participants

Moderator: Monica Woodley - Consultant, Independent

Gemma Steel - Director, General Counsel and Head of Compliance, Dozens

Hanna Raftell - Chief Client Officer, Head of Wealth Management, OPTI

Roi Tavor - Co-Founder & CEO, Nummo

Sara Koslinska - CEO, Limitless

Networking Break

10:30 - 11:00

Digitalizing Private Banking - a future built on core competencies

11:00 - 11:30

Participants

Moderator: Katie Derham - Broadcaster, BBC

Chris Bartz - CEO & Co-Founder, Elinvar

Jan Kühne - Chief Digital Officer, M.M.Warburg & CO

The WealthTech Vendor Ecosystem: Deals, Partnerships and Integrations

11:30 - 12:00

Participants

Stephen Wall - Co-founder, The Wealth Mosaic

Scaling Advice

12:00 - 12:45

Insights from institutions using digital technology and platforms to scale advice. Hear how automation can boost advisor productivity, improve process and empower investors with rich hybrid experiences.

- Where do you see the greatest application for digital transformation in the advisory process and the client journey?
- To what extent can a digital platform power both financial advisors as well as direct to consumer services?
- How does the shift from products toward digital solutions impact traditional distribution channels?
- How transformative are flexible data environments, such as cloud, in adopting third party integrations and developing new tech stacks?
- What are the ways that institutions can foster a culture of innovation such that they can embrace external partnerships?

Participants

Moderator: Alois Pirker - Research Director, Wealth Management, Aite Group

Lauren Brain - Lead Propositions Development Manager, UK Wealth, HSBC

Fahd Rachidy - Founder and CEO, Abaka

Dean Butler - Head of Innovation, Prudential UK

Lunch & Networking

12:45 - 14:00

Intelligent Portfolios

14:00 - 14:40

Data scientists, portfolio managers and the emergence of the digital CIO. Exploring the use of algorithms, AI and machine learning in asset management and fund selection.

- What investment features are needed to differentiate solutions in the digital space?
- How do we make portfolio mechanics more understandable or does it shift behind the scenes?
- Is the shift towards systematic methods and alternative data about improving performance, precision or personalisation?
- How can technology be used to link individual behaviours and passions into related investments?
- In what ways are digital solutions able to screen, measure and include ESG exposure?

Participants

Moderator: Paolo Sironi - FinTech Thought Leader and Author, IBM Watson

Hariton Korizis - Co-Founder & Chief Product Architect, ResonanceX

David Semmens - Head of Investment Strategy, Wealthify

Karan Shanmugarajah - CEO, WealthKernel

Debate: Does emotion hinder or help investing?

14:40 - 15:00

- Are volatile markets the time to rely on human empathy or system safeguards?
- Was 2018 a quant blip or do managers need to intervene in stress?

Participants

Moderator: Katie Derham - Broadcaster, BBC

Helps: Greg B. Davies PhD - Head of Behavioural Science, Oxford Risk

Hinders: Robert Van Beek - Founder and Director, About Life and Finance B.V.

Networking Break

15:00 - 15:30

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DAY 1 MAIN CONFERENCE - 10/09/2019

Running Robos

15:30 - 16:30
Running Robos - Stream A

Lessons learned, evolutions and reinventions. Includes strategic goals and challenges for advice, pricing and B2B partnerships

- What have we learned 10 years on from the first digital propositions?
- Are B2B partnerships and integrations the next frontier for distribution and scale-up?
- What have you understood about investor types, behaviour and engagement?
- Do you consider access to advisors an enhancement or a restructuring?
- What innovations can we expect in product offerings?

Participants

Moderator: Alois Pirker - Research Director, Wealth Management, Aite Group

Adam French - Co-Founder, Scalable Capital

Zakaria Laguel - Co-Founder, WeSave

Jad Sayegh - Co-Founder & CTO, Sarwa

Jakob Nordentoft Beck Thomsen - SVP, Global Head of Customer Engagement, Wealth Management, Danske Bank

Building Bridges

15:30 - 16:30
Building Bridges - Stream B

Connecting global technology communities and sharing best practice. Hear how country hubs and enterprise labs are forging new partnerships and mentoring programs.

- What are the key factors in establishing in-house innovation and accelerator programmes?
- How are governments working to share best practice and foster cross-border standards?
- To what extent can regional hubs help collaboration between start-ups and incumbents?
- What are the latest regulatory and trade body support initiatives and policies?

Participants

Moderator: Susanne Chishti - CEO, FinTech Circle

Xavier Gomez - Founder & COO, INVYO

Dr Kyros Khadjavi - New Venture Partner, FinLeap

Peter Smith - Non-Executive Director, Seneca Investment Managers

Tom Stevens - Chief Commercial Officer, ETFmatic

Powering Platforms

15:30 - 16:30
Powering Platforms - Stream C

The engines, wheels and tracks behind propositions. Experience front to back office technology and systems.

- How compatible are integrations with legacy enterprise architecture?
- Are modular APIs the most effective way to digitise processes?
- What are the use cases across direct to consumer, hybrid advisory and banking businesses?
- What does a typical end to end platform adoption cycle look like and who are they key stakeholders?

Participants

Moderator: April Rudin - Founder and President, The Rudin Group

Ozlem Robinson - Global Head of Brokerage, HSBC - Group Wealth Management

Mario Alves - Head of Sales & Partner Management, aixigo

Nikolai Hack - UK Managing Director and COO, Nucoro

Bart Vanhaeren - CEO & Co-Founder, Investsuite

Closing Keynote Day 1 - Digital for all: A new banking concept for vulnerable people

16:30 - 17:00

Participants

Maria Jose Jorda Garcia - Head of Digital and Customer, Fundación Microfinanzas BBVA

Drinks Reception

17:00 - 18:00

SCHEDULE

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DAY 1 MAIN CONFERENCE - 10/09/2019

TIME	BUILDING BRIDGES - STREAM B	POWERING PLATFORMS - STREAM C	RUNNING ROBOS - STREAM A
08:00	**08:30** - Registration, Coffee and Pastries	**08:30** - Registration, Coffee and Pastries	**08:30** - Registration, Coffee and Pastries
09:00	**09:05** - Opening Remarks & Welcome **09:15** - Opening Keynote: Global Trends and Innovations in Digital Wealth **09:45** - Financial Inclusion	**09:05** - Opening Remarks & Welcome **09:15** - Opening Keynote: Global Trends and Innovations in Digital Wealth **09:45** - Financial Inclusion	**09:05** - Opening Remarks & Welcome **09:15** - Opening Keynote: Global Trends and Innovations in Digital Wealth **09:45** - Financial Inclusion
10:00	**10:30** - Networking Break	**10:30** - Networking Break	**10:30** - Networking Break
11:00	**11:00** - Digitalizing Private Banking - a future built on core competencies **11:30** - The WealthTech Vendor Ecosystem: Deals, Partnerships and Integrations	**11:00** - Digitalizing Private Banking - a future built on core competencies **11:30** - The WealthTech Vendor Ecosystem: Deals, Partnerships and Integrations	**11:00** - Digitalizing Private Banking - a future built on core competencies **11:30** - The WealthTech Vendor Ecosystem: Deals, Partnerships and Integrations
12:00	**12:00** - Scaling Advice **12:45** - Lunch & Networking	**12:00** - Scaling Advice **12:45** - Lunch & Networking	**12:00** - Scaling Advice **12:45** - Lunch & Networking
13:00			
14:00	**14:00** - Intelligent Portfolios **14:40** - Debate: Does emotion hinder or help investing?	**14:00** - Intelligent Portfolios **14:40** - Debate: Does emotion hinder or help investing?	**14:00** - Intelligent Portfolios **14:40** - Debate: Does emotion hinder or help investing?
15:00	**15:00** - Networking Break **15:30** - Building Bridges	**15:00** - Networking Break **15:30** - Powering Platforms	**15:00** - Networking Break **15:30** - Running Robos
16:00	**16:30** - Closing Keynote Day 1 - Digital for all: A new banking concept for vulnerable people	**16:30** - Closing Keynote Day 1 - Digital for all: A new banking concept for vulnerable people	**16:30** - Closing Keynote Day 1 - Digital for all: A new banking concept for vulnerable people
17:00	**17:00** - Drinks Reception	**17:00** - Drinks Reception	**17:00** - Drinks Reception

Coffee and Pastries

08:30 - 09:05

Welcome Day 2

09:05 - 09:15

Participants

Katie Derham - Broadcaster, BBC

Opening Keynote Day 2 - The Great Rebundling

09:15 - 09:45

With billions of dollars in investment flowing into our sector, digital wealth management has become a bundled feature in a broader financial technology landscape.

As roboadvisors, neobanks, insurtech providers, digital lenders, and payments apps converge on the same value proposition, how do financial advisory institutions stay ahead of the curve? What should we make of the AI and technology powerhouses that are shifting from social media and transportation into the provision of investment product? What is the role of digital assets and emerging financial networks in this transformation?

Lex's keynote will enable both incumbents and Fintechs to respond to the broader market trends, and position themselves for the future.

Participants

Lex Sokolin - Global Fintech Co-Head, ConsenSys

Open Platforms

09:45 - 10:30

Discover the next gen marketplaces and business models of the future. How APIs and data integration open the door to products, collaboration and distribution partnerships

- Is open banking the catalyst for linking payments, lending and investing?
- How far does customer control of data simplify or complicate product choice and suitability?
- Are we moving towards financial control centres that run and coach our economic lives?
- Where does the power reside - transaction data, product manufacturing or customer relationships?

Participants

Moderator: Sarah Kocianski - Head of Research, 11:FS

Phil Alcock - Business Development Director, Raisin

Alan Walsh - Head of Network & Partnerships, Bud

Joe Parkin - Head of iShares UK Sales Team, BlackRock

Anna Frankowska - Manging Director & Co-Founder, Distributed Academy

Networking Break

10:30 - 11:00

In Conversation with Grant Locke

11:00 - 11:30

OUTvest is a hybrid Robo-advisor offering a combination of digital and human advice. There are around 2 million South Africans who have sufficient income to consider saving, but without access to regular financial advice, very little of these saving make it into the investment space. Hear how Grant and the team plan to change this.

Participants

Grant Locke - Head, OUTvest

Katie Derham - Broadcaster, BBC

Scaling Along the Spectrum of Digital Advice

11:30 - 11:45

The financial industry is in a state of evolution, as waves of change via digitisation, automation and consumer tech continue to alter clients' expectations of their advisers and fund managers. As the digitisation of advice starts to catch up with clients' expectations, the varieties of digital advice have started to proliferate. No longer is digital advice synonymous solely with "robo". Considerations like investor sophistication and adviser involvement have helped define these forms of digital advice. Specifically, these varieties include: Digital Advice Robo (for retail to mass affluent); Digital Advice Self-Select (for mass affluent to HNW); Digital Advice Planning (for retail to HNW); and Digital Advice Proposals (for HNW to UHNW).

This session will explain the different varieties of digital advice that are proliferating, and explore approaches for gaining automation and scale in these different channels.

Participants

Mark Trousdale - EVP & Chief Growth Officer, InvestCloud

Digital Engagement

11:45 - 12:30

Entry points and content are becoming more social and non-financial. Understand investor behaviour and communication powered by AI, chatbots and conversational interfaces.

- How do we make investing convenient, relatable and frictionless?
- Should we avoid stereotypes such as Millennials, Generation Z, Boomers and gender etc. and instead focus on individual behaviours?
- How do we best connect investing to goals, beliefs or societal values rather than solving a financial life plan?
- What are the most effective ways to improve financial literacy, create content and communication?
- Does money represent a means to financial security or fuel for passions? How does this impact product offering and design?

Participants

Moderator: Anna Lane - CEO, The Wisdom Council

Peter Brooks - Head of Behavioural Finance, Barclays

Daniel Thomson - Transformation Product Owner - Advice & Guidance, Lloyds Banking

Talieh Mann - Head of Group Advertising – Adviser & Invest, Vitality

Max Rothery - VP Community, Finimize

Lunch & Networking

12:30 - 14:00

Cyber Regulation

14:00 - 14:40

Leveraging technology for compliance and customer protection. How to manage data and enhance supervision of KYC, Identity and manage fraud detection

- To what extent do platforms and open ecosystems increase the risk of cyber attacks?
- What security issues arise with transactions increasingly becoming seamless and invisible?
- Do customers understand the notion of consent and the value around personal data?
- Will PSD2 and authentication improve the balance of protection along with scale and user experience?

Participants

Moderator: Monica Woodley - Consultant, Independent

Richard Peers - Founder, ResponsibleRisk

Mike Owen - Cyber Consulting Director, Mishcon de Reya

Alina Timofeeva - Consultant, KPMG

SESSIONS

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DAY 2 MAIN CONFERENCE - 11/09/2019

Debate: Asset based fees or subscription services?

14:40 - 15:00

- Is the industry over-charging or not expressing its value well enough?
- Should we be looking at other services for new pricing models?
- Are performance fees smart or do they create the wrong incentives?

Participants

Moderator: Katie Derham - Broadcaster, BBC

Thomas Schornstein - Global Head of Sales, additiv

Jemma Jackson - Head of PR, Interactive Investor

Networking Break

15:00 - 15:30

Digital Pensions

15:30 - 16:30
Digital Pensions - Stream A

Automating the complexity and accessibility of retirement solutions. Covering direct to consumer, auto enrolment and workplace opportunities

- How do we address the growth of multiple pension pots with average lifetime jobs projected to accelerate?
- What is the scope and potential to transform occupational pensions through B2B2C?
- How do we overcome the behavioural challenges of connecting long term futures to the everyday?
- What are the benefits of integrating retirement accounts alongside savings and bank accounts?
- To what extent do nudges and triggers vary from accumulation and decumulation phases?

Participants

Moderator: Katie Derham - Broadcaster, BBC

Lydia Fearn - Head of Defined Contribution & Financial Well-being, Redington

Frederik Burling - CEO, Advinans

Romi Savova - Founder & CEO, PensionBee

Digital Infrastructure

15:30 - 16:30
Digital Infratructure - Stream B

How blockchain and cloud-based engines can transform asset management, trading, exchanges and fund distribution

- Why is the integration of back-end to front-end technology so crucial for digital transformation?
- Where are the opportunities to leverage DLT across wealth and asset management?
- How can a global funds marketplace deliver friction-free asset management?

Participants

Moderator: Efi Pylarinou - Global finance Influencer & Fintech/Blockchain Advisor, Independent

Colin Bennett - Head of Digital Distribution, Global, GAM Investments

Cyrus Fazel - Founder & CEO, SwissBorg

Edward Glyn - Managing Director, Head of Global Markets, Calastone

Digital Advisors

15:30 - 16:30
Digital Advisor - Stream C

Discover how hybrid propositions are emerging, with more sophisticated digital tools and planning available for advisors

- How can advisors incorporate more data and personalised insights into client engagement?
- What AI applications are empowering and supporting advisors?
- What are the latest product innovations for onboarding and risk profiling?
- To what extent can financial planning and complexity be digitised to ensure suitability?

Participants

Moderator: Lex Sokolin - Global Fintech Co-Head, ConsenSys

Anka Mandleson - Co-Founder, Advantra Wealth

Roman Urnaut - Executive Director, Wealth Management Digital Hub, Vontobel

James Richardson - Head, WealthPilot, Brewin Dolphin

Xavier De Pauw - Group Head of Strategic Initiatives, Degroof Petercam

Closing Keynote Day 2: Transparency – Understanding the biological underpinnings of investment management to generate value for clients on digital

16:30 - 17:00

Participants

Paolo Sironi - FinTech Thought Leader and Author, IBM Watson

Close of ROBO19

17:00 - 17:05

Robo Investing Awards

17:05 - 17:35

Celebrating innovation in digital saving and investment across Europe.

The award categories are:

- Best Mobile App
- Best Personal Finance
- Best Interface
- Best Onboarding
- Best Investment Portfolios
- Best Ethical Investments
- Best Pension Solution
- Best Newcomer

Robo Investing Awards Drinks Reception - Battlebridge Room, Kings Place

17:35 - 19:35

SCHEDULE

Robo
Investing

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DAY 2 MAIN CONFERENCE - 11/09/2019

October 2018
Venue TBC
London

TIME	DIGITAL ADVISOR - STREAM C	DIGITAL INFRATRUCTURE - STREAM B	DIGITAL PENSIONS - STREAM A
08:00	**08:30** - Coffee and Pastries	**08:30** - Coffee and Pastries	**08:30** - Coffee and Pastries
09:00	**09:05** - Welcome Day 2 **09:15** - Opening Keynote Day 2 - The Great Rebundling **09:45** - Open Platforms	**09:05** - Welcome Day 2 **09:15** - Opening Keynote Day 2 - The Great Rebundling **09:45** - Open Platforms	**09:05** - Welcome Day 2 **09:15** - Opening Keynote Day 2 - The Great Rebundling **09:45** - Open Platforms
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