

Data Management, Data Analytics, AI and ML – Their Roles in Elevating the Wealth Management Proposition

3.00pm

Data Management, Analytics, AI and ML: Helping to Elevate the Wealth Management Proposition

- To set the scene, why is data the new oil for business of all types, and why is data management so important for the wealth management industry?
- What are the key trends taking place in wealth management globally and particularly in Asia, and where are the biggest challenges and opportunities that data-centric digital solutions can help overcome?
- What data management digital solutions and tools exist to help boost personalisation and the client journey, and where does AI and ML fit in?
- Where does AI-enhanced data link into other key protocols, such as CLM and CRM?
- As the client evolves, so also the wealth management proposition must evolve. Is this where ML fits in?
- What are the key competitive advantages of solutions that will help deliver greater client centricity, personalisation and client satisfaction?
- How can data management and analytics help to elevate the skills, capabilities and productivity of the RMs and advisors?
- How do the private banks and wealth firms make the right decisions around data and related digital tools, and then expedite and implement them effectively?
- What is coming next?
- Will AI & ML remove the role of an Advisor or other roles within the firm?
- How do you ensure that AI doesn't dilute/cheapen wealth management?
- What are the benefits and challenges of integrating AI into wealth management platforms?
- How will AI shape investing and wealth management? Can AI provide investment advice? What are the risks and limitations?
- How can individuals make informed decisions with AI-generated financial advice?

Darell Miller
Managing Director APAC
Wealth Dynamix

Ronald Yim
General Manager, Hong Kong
StashAway

Jitendra Tekchandani
Executive Director, Customer Science & Segment, Wealth Management
DBS Bank

Andrew Bresler
Chief Revenue Officer & Deputy General Manager – APAC
InvestCloud

David Wilson
Principal Director, Asia Wealth Management Lead
Accenture

4.00pm

Webinar Ends