Enhancing Investment Engagement with Clients using Digital Tools

3.00pm	Enhancing the Investment engagement with clients using digital tools

- What is client engagement all about in the post-pandemic universe, how has it evolved and where is it heading?
- Can the 'human touch' be replaced by digital?
- How do you create a virtual 'Investment Consultant' to create scalability?
- How can you improve 'portfolio solutions' for clients?
- How can digital help create the right 'thematic' engagements with clients?
- CIO tools: How to source best in class products?
- Risk oversight: How do you ensure risk and ESG suitability across advisors and clients?
- Sales enablement: How do you assess current portfolios and proposed new solutions?
- Client engagement: How do you increase client retention with value added insights?
- Where and how can digital help private wealth management firms better engage with their clients?
- How can such tools help boost client loyalty and also help banks and other firms connect to and convert new clients in a WFH world?
- How can the advice on offer be curated and delivered to be more relevant, more informative, more tailored and more engaging?

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4.00pm	Webinar Ends