Independent Wealth Managers – Embracing Digital Tools to Enhance their Advantage

3.00pm

Independent Wealth Managers – Embracing Digital Tools to Enhance their Advantage

- What were the specific challenges for the IAM community in the pre-pandemic world and how have those been exacerbated or diminished during the pandemic?
- For the IAMs, which of course are relatively small compared to the banks, how do they assess what they truly need in terms of digitalisation, and where to invest their funds?
- How do they then manage the implementation of these solutions?
- Are they aiming for front-to-back digitisation, or are they being more targeted, more selective, on other words focusing on eg KYC/AML/Onboarding, or on compliance/RegTech, or on empowering the RM through digital tools/data/analytics/machine learning and so forth?
- How are the IAMs working with the external digital product, execution and even custody platforms, and why?
- What are the next developments from an execution and custody perspective?
- How can digital tools truly enhance the client experience?
- Which types of clients in Asia demand the optimal digital interface, and what about the younger generations?
- Reporting/auditing/consolidation of client information – how can they get this right and is the data truly secure?

Tanmai Sharma
CEO and Founder
Canopy

Mark Nelligan
Chief Executive Officer
Pershing Singapore, a BNY Mellon company

Will Lawton
Independent
Acalution

Damian Hitchen
Chief Executive Officer, Singapore
Swissquote

Frank Maltais
Regional Head of Sales, APAC
SS&C Eze

Tim Smith
Managing Director, Asia Pacific
Investsuite

4.00pm

Webinar Ends