

Tech-Driven Hyper-Personalisation in Asia's Wealth Management Markets

3.00pm

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- What is personalisation and hyper-personalisation and why is this so important to the future of wealth management in Asia?
- How do you personalise wealth services?
- What is the 'pot of gold' ahead for those who get this right, and what are the dangers for those who fail to grasp this future?
- What does it mean to convert the wealth management relationship approach from transactional to human-centric?
- How is hyper-personalisation deliverable, through robo-advisory or through human advisors, or can this be a combination of both, specific to different segments of the wealth market?
- What are the particular attributes of Asia's demographics and wealth markets that make this thrust to tech-driven personalisation so important?
- What digital technologies and solutions are available today and upcoming that will help drive hyper-personalisation?
- How does client onboarding and KYC influence the future delivery of a highly personalised offering?
- What role does CRM/CLM play in hyper-personalisation and what tools and solutions can help drive a deeper understanding of the clients and the ongoing learning that is required?
- What roles do AI and ML play and how do the banks and wealth firms hone this technology to help them in this quest towards democratisation and personalisation of wealth management?
- For the upper categories of wealth, where the hybrid wealth management model appears to be the future, what does the RM's cockpit look like today and how will it evolve in the years ahead?
- How can the wealth industry make the delivery of products, ideas and advice more and the overall experience more 'pleasant', more consistent and more productive?
- How can the RMs/advisors be encouraged, educated, and incentivised to deliver hyper-personalisation to their clients?
- Finally, what are the dangers of not getting this right? Will the Fintechs and 'Big Techs' crowd in to Asia's wealth market and deliver a more personalised, relevant, suitable, behaviour-based offering, using the very latest digital tools and strategies, or are the brand-name financial institutions able to fight and win, leveraging both digital tools, the right approaches and their often highly loyal client bases to their advantage?

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4.00pm

Webinar Ends