MIDDLE EAST WEALTHTECH FORUM 2021
3 & 4 May 2021 | Digital Conference

DAY 1 | 3 MAY 2021, MONDAY

10:00 AM **WELCOME NOTE**

10:05 AM **OPENING KEYNOTE**

10:20 AM **PANEL DISCUSSION: An Overview of Wealthtech Adoption in the Middle East**
- The changing face of client relationships in wealth management
- The impact of a booming Fintech and Wealthtech ecosystem
- Keys to success in digitization and how financial institutions can embrace technology

10:50 AM **The Rise of Robo Advisors in Wealth Management**
- Why should banks invest in digital advice products and services portfolio?
- Robo advisors vs financial advisors – Creating a balance for a valuable and reliable client experience
- How Robo advisors enhances wealth management portfolios and delivers competitive advantage

11:00 AM **NETWORKING BREAK, MEETINGS & CONTESTS**

11:15 AM **PANEL DISCUSSION: The Chief Investment Officer View: The Role of Investment Managers in the Post COVID-19 Era**
- Identifying technology opportunities for regulatory challenges
- The path to becoming a digital leader in asset management
- The risks, opportunities and new investment frontiers in the road to recovery

11:45 AM **The 'Digital First' Future of Client Onboarding Experience, KYC And CLM**
- How to assess the tangible outcomes of a digital client onboarding initiative
- What is the expected ROI, NPV, and payback period?
- Impact on bottom line by improved CX and creation of back-office efficiencies

11:55 AM **NETWORKING BREAK, MEETINGS & CONTESTS**

12:10 PM **The Regtech Revolution: Compliance and Wealth Management in 2021**
- How Regtech will be key in clearing up the perennial regulatory cloud?
- Does the future belong to AI & ML aligned with human intelligence?
- How data driven Regtech powers regulatory productivity?

12:20 PM **The Transformation of Wealth Management: Key trends for 2021 and beyond**
- The post COVID-19 Resilience Agenda: The Wealth Manager's Guide to the New Era of Volatility
- Disruptive trends impacting wealth management
- Are sustainable investing (SI) strategies and instruments the future over conventional equivalents?

12:30 PM **Q&A | CLOSING REMARKS**

12.40 PM to 5:00 PM **SCHEDULED NETWORKING MEETINGS**

DAY 2 | 4 MAY 2021, TUESDAY

10:00 AM **WELCOME NOTE**

10:05 AM **OPENING KEYNOTE**

10:20 AM **PANEL DISCUSSION: Regulatory Compliance and Innovation Trends in Wealth Management – A Global Perspective**

- A holistic view on forward-looking practices in Wealth Management
- How digital technology will accelerate the transformation of wealth management
- Are the consumer expectations changing? What will be the best CX models going forward?

10:50 AM **Robotic Process Automation - A Roadmap for Wealth Management**

- Why is RPA relevant in investment and asset management?
- Importance of freeing wealth managers from repetitive, revenue-killing tasks
- Case study: RPA applications to the Investment Management industry

11:00 AM **NETWORKING BREAK, MEETINGS & CONTESTS**

11:15 AM **PANEL DISCUSSION | Digitizing the Wealth Management Experience: Refocus On The Customer & Delivering Customer-centric Journeys**

- How to empower clients and build customer goodwill right from the start?
- How to be in sync with investors' demand for personalisation, low fees & better returns
- The Great Wealth Transfer: How can wealth management teams align with the changing client demographics?

11:45 AM **AI & Analytics in Asset Management**

- The role of advanced analytics in asset management value chain
- Why asset management firms need data science and machine learning platforms
- How data-driven investment management is key to success and competitive advantage

11:55 AM **NETWORKING BREAK, MEETINGS & CONTESTS**

12:10 PM **Chatbots And Beyond: Role of AI in Reshaping the Future of Wealth Management**

- Applications of chatbots in building personal wealth
- Emergence of interactive digital agents for Personal Finance Assistance
- Conversation UX – Importance of Bot humanization in delivering client engagement and loyalty

12:20 PM **The Impact of CRM in enabling relationship-focused Asset Management business**

- How to Use CRM to Build Relationship Capital?
- How CRMs can keep Asset Managers on top of regulatory and compliance requirements?
- Harnessing the power of data, insights and improved advisor efficiency

12:30 PM **Q&A | CLOSING REMARKS**

12.40 PM to 5:00 PM **SCHEDULED NETWORKING MEETINGS**