

COOs – Strategies to Enhance the Platform

3.00pm

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- What are the key trends taking place in wealth management globally and especially in Asia, where are the biggest challenges and opportunities, and are you prepared?
- How can the new wealth model align both the human and digital in a seamless collaboration for the delivery of optimised investment products, ideas and advice for private wealth clients?
- How are the banks and EAMs making their organisations more agile?
- What role will the RM play in the post-pandemic world, and how can his/her relevance and productivity be enhanced to make them more effective and to boost client outcomes and experience?
- How are you balancing off the platform's self-serve capabilities and the clients' need for human connectivity and advice?
- How do you secure and retain the best talent?
- How do the banks interface with the expanding IAM/EAM community, and what sorts of relationships are being built and how?
- What is coming next in the world of digital technologies and services that will further enhance the wealth management offering in the region, and how can those improve the proposition?
- Do the banks and wealth firms know enough about the vital role of data management and analytics and the application of AI and Machine Learning?
- Is enough being achieved in the field of CLM/CRM to deliver personalisation, relevance, suitability and thereby achieve better levels of client loyalty?
- Is there a sufficiently strategic approach to using digital to improve systems and processes, as well as to help these banks and private wealth management firms better engage with their clients?
- How do the private banks and retail banks make the right decisions, firstly around the best areas to focus on, and then around the optimal solutions to adopt and which technology partners to work with?
- What approaches does the panel consider the market players should take to ongoing digital transformation? Should they build, buy, or outsource, and how can they properly assess the providers?
- Who implements the decisions, and is enough being done to ensure the right levels of internal adoption/buy-in, and to make sure that the private clients understand the advantages and can make full use of the new and improved suite of capabilities on offer?
- What is your vision for wealth management in Asia?
- How are wealth management firms dealing with the more demanding regulatory requirements around suitability and ESG?
- How are you ensuring that all investment products offered on platforms to private wealth clients are compliant with relevant regulations and are aligned with their investment objectives?
- In the context of asset diversification, how does your institution ensure compliance with various asset types, including digital assets, and maintain a seamless investor experience?
- How do private banks and wealth management firms prioritize compliance and regulations when developing and implementing new digital technologies and services? Are there specific measures in place to ensure that these solutions are fully compliant with all relevant laws and regulations?
- What measures do you have in place to ensure that all staff members are trained and knowledgeable about relevant regulations and compliance requirements?

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4.00pm

Webinar Ends