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Dear AIWM Members,

The digital transformation of the financial services industry is continuing apace, and robo-advice and digital wealth management are a fast-growing part of this digital transformation. Originally conceived as a means of extending financial advice to the mass market, the technology's real potential lies in its use being extended to insurance, pensions and other sectors. As robo-advice matures and expands from innovative start-ups to incumbents who are increasingly adopting or integrating the technology into their business models, having a clear perspective, not only of how the market is developing and where the opportunities will lie in the future, but also of regulatory expectations, will become increasingly critical. The latter point is particularly relevant given the FCA's recent, multi-firm review of automated investment services.

Attendance at the second edition of the [UK Robo Advice and Digital Wealth Summit](#), which is to take place on **20th September** in **London**, will therefore be invaluable for both incumbents and start-ups that want to know how to adjust their business models to take full advantage of the significant opportunities presented by robo-advice and digital wealth management. This year's conference will also involve a keynote address by the **FCA's Anna Wallace** among many other high-level speakers.

Key discussion areas include:

- Robo-advice: progress so far and opportunities ahead
- Meeting the developing expectations of regulators
- Robo-advice in the UK: a country specific perspective
- Customer acquisition and engagement
- Increasing the granularity and quality of advice
- Outlook for robo-advice in the pension and insurance sectors
- Robo-advice from two different angles: established financial institutions and fintech start-ups

Speakers include:

Anna Wallace, Head of Department, Innovate, Financial Conduct Authority

John Barrass, Deputy Chief Executive, PIMFA

Giovanni Dapra, Co-Founder and Chief Executive Officer, Moneyfarm

Andrew Firth, Chief Executive, Wealth Wizards

Adam French, Co-founder & Director, Scalable Capital

Michael Gruener, Managing Director & Head of EMEA Retail Business, BlackRock

Tomasz Krzywicki, General Counsel (Europe & US), Wealthsimple

Kevin Mountford, Chief Executive, Raisin UK

Hemal Mehta, Founder and Chief Executive, AtomInvest

Uday Nimmakayala, Chief Executive, WealthObjects
Joe Parkin, Head of Wealth and Retail - UK, Ireland and the Channel Islands, iShare
Romi Savova, Chief Executive, Pension Bee
David Stevens, Life Advice Director, LV=

Daniel Tammast-Hasting, Managing Director and Founder, RiskSave
Daniel Thomson, Digital Product Owner – Retail Investments, Lloyds Banking Group
Chris Truce, Head of FinTech, Saxo Bank Group
Caroline Vaughan, Head Of New Business, Innovate Finance

Who should attend:

C-level Executives, Senior Officers, Directors, Heads, and Managers of:

Business Analysis
 Business Development
 Client Lifecycle & Relationships
 Compliance
 Data Security
 Digital Wealth
 Information Security
 Innovation, Digital, Marketing & Communication
 Legal (In-house and External)
 Market Structure and Technology
 Personal and Retail Investing
 Platform Development
 Project Management
 Propositions & Distribution
 Regulation
 Strategy
 Wealth Management

Representing the following industries:

Asset Management
 Banking and Finance
 Consultancy & Advisory Services
 Compliance technology
 Digital Managers and Advisors
 Fintech / Regtech
 Institutional Investors
 Insurance
 PE / VC Funds
 Pension Fund Managers
 Regulators & Industry Bodies
 Wealth Management

Delegate Fees:

Delegate Fee:	£595.00 + VAT
Small Company and Fintech rate*:	£199.00 + VAT

****Small Company" refers to a company or group with fewer than 50 employees.
 Fintech rate applies to any company registered as an official company for less than 3 years at the date of the event, which is not a subsidiary or part of a group established for longer than this period and which offers a product and/or service usually classified as FinTech.**

***Use discount code 'ROBO2AIWM' to get 20% off the fees quoted above.**

Registration Options:

**in all cases the code above must be mentioned for the discount to be applied to the private sector fee.*

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