

Send An Executive To Our Afternoon Technology Roundtable Discussion And Networking Event



ATTENDEES

40-60 CTOs, CIOs and CEOs from 2018 Industry Award finalist companies — including broker/dealers, custodians, TAMPs and leading technology platforms

MODERATORS

- Tim Welsh, Nexus Strategy, LLC
- Darrin Courtney, Gartner
- Doug Fritz, F2 Strategy

EVENT FLOW

- 3:00 – 3:30 Welcome and networking
- 3:30 – 4:30 Roundtable discussions
- 4:30 – 5:30 Cocktail reception and networking

KEY THEMES

- What the future is for advisor technology
- Client experience technology, PFM, account aggregation
- Artificial intelligence, machine learning, predictive analytics
- New user interfaces, such as voice-activated Siri, Alexa and Google Assistant
- Big data
- Digital advice (robo) investing and planning
- Technology integration — data standards
- Cybersecurity
- Internet of Things

This event will be covered by the WealthManagement.com editorial team for a special technology supplement in *WealthManagement* magazine.