CONHECIMENTO E VISÃO DE FUTURO

INSTITUTO DE FORMAÇÃO BANCÁRIA
ASSOCIAÇÃO PORTUGUESA DE BANCOS

ADVANCED DIGITAL WEALTH MANAGEMENT

Winning Tactics and Strategies

SAVE THE DATE

2019 *
11 DECEMBER

ADVANCED TRAINING

INFO
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* As formações calendarizadas funcionam com um número mínimo e máximo de formandos, pelo que, a realização das mesmas encontra-se sujeita a confirmação.

ADVANCED DIGITAL WEALTH MANAGEMENT
Winning Tactics and Strategies

IFB INSTITUTO DE FORMAÇÃO BANCÁRIA
ASSOCIAÇÃO PORTUGUESA DE BANCOS

TRAINER: Mr David Gyori

CEO of Banking Reports (London), Co-Author of 'The FINTECH Book' (international best seller published by Wiley & Sons), Judge of the European FinTech Awards (Amsterdam), Founding Member of the World FinTech Association (Seoul), Featured Writer of Finance Magnates (Tel Aviv).

LOCATION: LISBOA – Av. Barbosa du Bocage, 87 – R/C

COURSE FEE: APB member: 550€ / Non-members: 630€

ADVANCED TRAINING

PROGRAM

09:00-09:30 Welcome, Introduction and Warmup

09:30-10:45 **1. The Strategic Challenge: DIGITAL AND PHYSICAL**
- **The FinTech Revolution**: ICT as a GPT (General Purpose Technology), 30 Key Emerging Areas of Financial Technology
- **New Players**: FinTech Startups, TechFin Giants GAFA BAT, Neo Banks, MNOs (Mobile Network Operators)
- **New Clients**: Millennials, GEN Z, The Digital Skills Gap, The Loyalty Problem, Digital Lock-in Effect, Disappearing Industries
- **New Channels**: Smart Phone, Smart Watch, Video, AR, VR

11:00-12:30 **2. Wealth Management Innovation Strategies: BIG PICTURE**
- **Three Key Forms of Corporate Innovation**: Efficiency Innovation, Sustainability Innovation, Disruptive Innovation
- **The Seven Characteristics of Disruptive Innovation**: Quality, Price, Demographics, Business Model, Middle, Defence, Time
- **The Christensen Strategy**: Systematic Allocation of Resources
- **The Ambidextrous Organization Strategy**: Profit and Growth
- **The Toyota Strategy**: Dual Roles, Innovation Super Committee

12:30-13:30 LUNCH

13:30-14:45 **3. World of Roboadvisors: Level 1**
- **Typology**: B2B vs B2C; Human, Hybrid, Automated; Partnering, Buying, Building; The Segment Complexity Matrix
- **Ownership**: Banks, FinTechs, TechFins, Wallets, PSD2, MNOs, Brokerages, Portfolio Managers, Social Traders, Copy Traders
- **Three Generations**: Gen1 Risk Questionnaires, Gen2 Discretionary Portfolio Managers, Gen3 Holistic Financial Portfolio Builders

15:00-16:00 **4. Roboadvisors of the World: Level 2**
- **Open Banking and Automated Investments**: 10 MINI CASE STUDIES from UK and Canada – Money Box, BankMe, Bud, Budget Insight, Money Dashboard, Emma, Yolt, Ytree, Zeux, Fintify
- **Mega Robos**: Aladdin, Vanguard, Acorns, Schwab Intelligent, Personal Capital, Portfolios, Betterment, Wealthfront, Wealth Simple, Future Advisors, BondIT, BondAI, Plum, Mioying
- **Digital Investment Managers**: Bloom, Ellevest, Hedgeable, LearnVest, Motif, SigFig, Twine, M1 Finance, OpenInvest, Plinqit, Omnetrium, Bambu, Groww India, My Investment by HSBC

16:00-17:00 **5. New Asset Classes and New Risks Rising**
- **Crowdfunding and P2P Lending**: Securitization, Marketplace Lending, Online Balancesheet Lending, NPL Rates, Due Diligence
- **Crypto Currencies**: Bitcoin, Crypto by Banks (JP Morgan, MUFG), CBDCs, ICOs, STOs
- **Data as an Asset Class**: GDPR in Europe vs Data Ecosystems in China, Alternative Data, Datafication

Best for Participants from Following Backgrounds:

Primary Participants:
➔ WEALTH MANAGEMENT
➔ RETAIL BANKING
➔ PREMIUM BANKING
➔ PRIVATE BANKING
➔ PORTFOLIO MANAGEMENT
➔ ASSET MANAGEMENT
➔ FUND MANAGEMENT

Secondary Participants:
➔ SME BANKING
➔ BROKERAGE
➔ SOCIAL TRADING, COPY TRADING, ONLINE TRADING
➔ TREASURY
➔ PRODUCT DEVELOPMENT
➔ MARKETING
➔ DIGITAL CHANNELS
➔ PENSION MANAGEMENT
➔ INSURANCE
➔ PRIVATE BANKING
➔ PREMIUM BANKING
➔ MULTI FAMILY OFFICES
➔ SINGLE FAMILY OFFICES
➔ FOREX
➔ ANALYSTS
➔ BANKERS
➔ DATA SCIENTISTS
➔ COMMUNICATIONS EXPERTS
➔ MOBILE NETWORK OPERATORS
➔ IT VENDORS
➔ THIRD PARTY SOLUTIONS PROVIDERS

The **'ADVANCED DIGITAL WEALTH MANAGEMENT'** Intensive Training Program is ideal for Operative, Tactical as well as Strategic Decision Makers. All major functional areas are well served from within WEALTH MANAGEMENT, while multiple secondary target groups can learn a lot and engage in discussions related to current global best practices, leading trends and solutions.

➔ STRATEGIC OVERVIEW
➔ MILLENNIALS AND GEN Z
➔ THE WINNING DIGITAL TRANSITION STRATEGIES
➔ NEW ASSET CLASSES
➔ BIG DATA, AI, ML
➔ ROBOADVISORS THEORETIC
➔ ROBOADVISORS, 40 MINI CASE STUDIES
➔ CHANNELS, PRODUCTS, MARKETING
➔ CYBERSECURITY

DGERT ENTIDADE FORMADORA CERTIFICADA

FULL MEMBER OF

EBTN EUROPEAN BANKING & FINANCIAL SERVICES TRAINING ASSOCIATION Aisl

Pedidos de Cancelamento: Só poderão dar origem ao reembolso total do valor pago, quando recebidos até 5 dias úteis antes da data de início do curso. A partir deste prazo, a inscrição será paga na totalidade, podendo, no entanto, o participante ser substituído por outro; Deverão ser efetuados por e-mail e rececionados pelo IFB dentro do prazo acima estabelecido.