

Peripatetic platforms

Agenda:

“Platforms are on the move. They have sat predominantly in IFA channels for the last decade but are now expanding to the mass market to service direct customers and upstream, to service traditional private banking or wealth management customers.”

What do these customers want?

How can we deliver this to them?

Can the same platform service all of these sectors?

Sponsors: Logica and SEI

Venue: Logica, Seventh Floor, Kings Place, 90 York Way, London, N1 9AG

Date: Thursday 20 January 2011

Attendance is by invite only – please contact The Platform for details

08:30 – Coffee and registration

09:00 – Introduction and market update – *(Chair, Holly Mackay, MD, The Platform)*

Setting the scene – IFA platforms, B2C platforms and Wealth Management platforms

0915-0945 SESSION ONE – How is the web changing our landscape?

Rob Pink, Senior Industry Manager, Finance, Google

Jeremy Fawcett, Finance Category Director, Yahoo

0945-1020 SESSION TWO - Customer behaviour and how this translates to proposition. Our two experts will talk about understanding and engaging with the digital consumer and what it means for wealth platform portal design and delivery.

Elaine Doherty, Principal Business Consultants, Social Media Division, Logica

Allison Fower, Head of Wealth Management, Logica

1025-1105 SESSION THREE - Picking up on the ideas introduced above, we continue by looking at the B2C channel. Three experts share their ideas and experience with us and we then have 10 minutes for questions and discussion.

What do customers want and what opportunities does the direct channel present?

Lucian Camp, MD, Lucian Camp Consulting

Rob Hudson, Head of Direct, Close Brothers

Mike Free, CEO, Sammedia

Our panel will examine how we currently engage directly with customers and how we might change to talk in a more interesting and meaningful way.

1105 – 1130 COFFEE

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1130 – 1210 SESSION FOUR – The Wealth Managers' Dilemma. So you want to run your own platform and retain control of the customer service and administration BUT you also want to double your business over the next three years. Is this achievable? Neither is the relationship with platforms two-dimensional – they are important distribution partners as well as admin solutions. How should wealth managers engage with platforms?

Ryan Hicke CEO, SEI UK
David Scott, CEO, Vestra Wealth
Stephen Harris, MD, Wealth Briefing

1210 – 1300 SESSION FIVE- Can one platform really service "The People" and "The Posh"? We ask each of our panellists to take 5 minutes to outline their views of the world before asking for comments and input from the floor, ending with a broader discussion about how (or whether) platforms will spread out of the current IFA sector and be the accepted delivery mechanism of financial products and services to all.

Pete Burtonshaw, Head of UK Platforms and FundsNetwork, Fidelity
Tim O'Connor, Director, Barclays
Andy Creak, CEO, rPlan (former COO Cofunds)
Albert Maasland, UK CEO, Saxobank

1300-1400 LUNCH

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