



# ADVANCED DIGITAL WEALTH MANAGEMENT

WINNING TACTICS AND STRATEGIES

10 - 12 August, 2020

Virtual Classroom

Price: 550 JD



# ADVANCED DIGITAL WEALTH MANAGEMENT

The '**ADVANCED DIGITAL WEALTH MANAGEMENT**' 3 Day 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



## BEST FOR PARTICIPANTS FROM FOLLOWING BACKGROUNDS:

### PRIMARY PARTICIPANTS:

- Wealth Management
- Portfolio Management
- Asset Management
- Fund Management
- Retail Banking

### SECONDARY PARTICIPANTS:

- 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

## COURSE OUTLINE

### Day 1: SETTING THE SCENE

09:00-09:30 09:30-11:45	<b>Welcome, Introduction and Warmup</b> <b>1. Definition and History</b> <ul style="list-style-type: none"><li>• <b>The FinTech Revolution:</b> ICT as a GPT (General Purpose Technology), 30 Key Emerging Areas of Financial Technology</li><li>• <b>New Players in Banking:</b> FinTech Startups, TechFin Giants, Neo Banks, MNOs (Mobile Network Operators)</li><li>• <b>The Digital Transition Project:</b> The Red Queen Effect, Evolutionary Biology in Banking, The Banking Innovation Paradox, Moore's Law and Metcalfe's Law, Information Cascades</li></ul>
12:00-13:00	<b>2. Millennials Need Digital Excellence</b> <ul style="list-style-type: none"><li>• <b>Definition of Millennials:</b> The Lethal Digital Divide, Demographic Trends, 'The Instant Generation', Differences in Time-Perception</li><li>• <b>Design and Interface:</b> User Experience the New Product, Interface Defines UX, Design Defines Interface, the Steve Jobs Interface Test</li><li>• <b>Loyalty:</b> The Third New Dimension of Loyalty, Extended Loyalty, Digital Lock-In Effect, Participative Benefits</li></ul>
13:00-14:00	Break
14:00-17:00	<b>3. Digital Transition Strategies</b> <ul style="list-style-type: none"><li>• <b>3 Types of Corporate Innovation:</b> Efficiency, Sustainability, Disruptive</li><li>• <b>Primary Strategies:</b> The Christensen Strategy, The Ambidextrous Organization Strategy, The Toyota Strategy</li><li>• <b>Secondary Strategies:</b> The TRIZ Strategy, The Three Horizons Strategy</li></ul>

### LEARNING OBJECTIVES OF THE SESSIONS OF DAY 1 INCLUDE:

- Ability to list **KEY AREAS** of financial technologies driving digital transition within Wealth Management.
- Capability to communicate and identify **KEY RISKS** related to digital transition in Wealth Management.
- To understand the preferences of the new generation and to be able to adequately address **MILLENNIALS AND GEN Z** by WM products.
- Ability to understand and choose between leading global digital transition best practices and to **STRATEGIZE** next years of Wealth Management

## Day 2: THE NEW ECOSYSTEM

09:00-09:30 09:30-11:45	<p><b>Refreshing Day One and Warmup</b></p> <p><b>4. New Asset Classes Rising</b></p> <ul style="list-style-type: none"> <li>• <b>Crowdfunding and P2P Lending:</b> Securitization, Marketplace Lending, Online Balancesheet Lending, NPL Rates, Due Diligence, Loan vs Equity</li> <li>• <b>Crypto Currencies:</b> Bitcoin, Top 10 Cryptos, Direct and Indirect Crypto Investment, Crypto by Banks (JP Morgan, MUFG), CBDCs, ICOs, STOs</li> <li>• <b>Data as an Asset Class:</b> GDPR in Europe vs Data Ecosystems in China, Alternative Data, Datafication</li> </ul> <p><b>5. Big Data in Wealth Management</b></p> <ul style="list-style-type: none"> <li>• <b>Origins of Big Data:</b> IoT, 5G, M2M Communication, 1990 the birth of the term, 2003 the Google Turning Point, The s Vs of Big Data</li> <li>• <b>From Big Data to AI:</b> RPA vs AI, AI vs AGI, Sigmoid Functions in Practice</li> <li>• <b>From AI to Machine Learning:</b> Artificial Neurons, Neural Networks, Deep Neural Networks, Deep Learning, The 7 Levels of Machine Intelligence</li> <li>• <b>One Step Ahead:</b> Point of Singularity, Machine Superintelligence, Transhumanism, Elon Musk vs Mark Zuckerberg vs Masayoshi Son</li> </ul>
12:00-13:00	
13:00-14:00	Break
14:00-17:00	<p><b>6. World of Roboadvisors: Level 1</b></p> <ul style="list-style-type: none"> <li>• <b>Typology:</b> B2B vs B2C; Human, Hybrid, Automated; Partnering, Buying, Building; The Segment Complexity Matrix</li> <li>• <b>Ownership:</b> Banks, FinTechs, Tech Giants, Mobile Wallets, PSD2, MNOs, Brokerages, Portfolio Managers, Social Traders, Copy Traders</li> <li>• <b>The Three Generations:</b> Gen 1 Risk Questionnaires, Gen 2 Discretionary Portfolio Managers, Gen 3 Holistic Financial Portfolio Builders</li> </ul>

### LEARNING OBJECTIVES OF THE SESSIONS OF DAY 2 INCLUDE:

- Knowledge of **THE NEW ASSET CLASSES RISING** as well as thorough understanding of the risks related to these exponential trends.
- Readiness to differentiate between traditional software versus **ARTIFICIAL INTELLIGENCE** propelled advanced solutions.
- Skills to argue for and against **DEEP LEARNING** in wealth management using legal, ethical, practical as well as ROI related reasoning.
- Excellence in segmenting **ROBOADVISORS** as well top-quality understanding of the **GENERATION 1, 2, 3 EDITIONS** of **ROBOADVISORY PRODUCTS**





## Day 3: TOOLS AND CAPABILITIES TO WIN

09:00-09:30 09:30-11:45	<b>Welcome, Introduction and Warmup</b> <b>7. Roboadvisors of the World: Level 2</b> <ul style="list-style-type: none"> <li>• <b>Open Banking and Automated Investments:</b> 10 MINI CASE STUDIES from UK and Canada – Money Box, BankMe, Bud, Budget Insight, Money Dashboard, Emma, Yolt, Ytree, Zeux, Fintify</li> <li>• <b>Mega Robos:</b> Aladdin, Vanguard, Acorns, Schwab Intelligent, Personal Capital, Portfolios, Betterment, Wealthfront, Wealth Simple, Future Advisors, BondIT, BondAI, Plum, Mioying</li> <li>• <b>Digital Investment Managers:</b> Bloom, Ellevest, Hedgeable, LearnVest, Motif, SigFig, Twine, M1 Finance, OpenInvest, Plinqit, Omnetrium, Bambu, Groww India, My Investment by HSBC</li> </ul>
12:00-13:00	<b>8. Advanced Digital Channels, Products and Marketing</b> <ul style="list-style-type: none"> <li>• <b>Channels:</b> The 5 Stages of Channel Evolution, Video, Facebook, Website, App, Smart Watch, Voice, Chat, AR, VR, Smart Lenses</li> <li>• <b>Products:</b> The Roger Scale of Digital Product Development, Pretotyping, Robot Traders, The Robot Paradox</li> <li>• <b>Marketing:</b> Gamification, Advetorials, Affiliate Marketing, Comarketing, Entertainmerce, Infomercial, Lead Nurturing, Stereo Referral, Habit Forming, Voice Marketing, Digital Availability Bias</li> </ul>
13:00-14:00	Break
14:00-17:00	<b>9A. Cybersecurity</b> <ul style="list-style-type: none"> <li>• <b>Innovation vs Digital Risks:</b> GAN Generative Adversarial Networks, The Google Effect, Digital to Physical, Physical to Digital</li> </ul> <b>9B. Summary</b> <ul style="list-style-type: none"> <li>• Concepts, Tools, Trends</li> <li>• 'To-Do's, Resources</li> </ul> <b>Evaluation and Termination of the Seminar</b>

### LEARNING OBJECTIVES OF THE SESSIONS OF DAY 3 INCLUDE:

- Awareness of **40 SPECIFIC LEADING ROBOADVISORY SOLUTIONS** from all around the world.
- Application of cutting edge digital **CHANNEL, PRODUCT and MARKETING** best practices in financial services.
- Ability to dissect **PHYSICAL VS DIGITAL** risks as well as to identify and optimize the relationship between **INNOVATION and CYBER RISKS**.





## TRAINING PROVIDED BY:

### DAVID GYORI

**A globally renowned FinTech consultant, trainer, author and keynote speaker.**

He is among the 'Top 50 Global Thought Leaders and Influencers on FinTech' as of November 2019

David is CEO of Banking Reports London, providing top quality 'FinTech Training for Bankers' all over the world. David is co-author of five books, including 'The FINTECH Book', published by Wiley and Sons quickly becoming a global category best-seller in 2016.

#### AS A LEADING AUTHORITY ON FINANCIAL TECHNOLOGY DAVID IS CO-AUTHOR OF 5 BOOKS:

- **'The FinTech Book'** (Wiley & Sons, London, 2016)
- **'The WealthTech Book'** (Wiley & Sons, London, 2018)
- **'WealthTech: Wealth and Asset Management in the FinTech Age'** (IAP, USA, 2019)
- **'The PayTech Book'** (Wiley & Sons, London, 2020)
- **'The AI Book'** (Wiley & Sons, London, 2020)

#### FOR REGISTRATION:



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