

Cutter Wealth Conference

Tuesday, February 26, 2019

etc. venues County Hall, Belvedere Road, London, SE1 7PB

CUTTER
ASSOCIATES
WEALTH

| Time | Topic |
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| 12:00 - 13:00 | Meeting Registration & Lunch Connect with peers and exhibitors over lunch. |
| 13:00 - 13:10 | Opening Remarks |
| 13:10 - 13:40 | Digital Strategy: Framework for the Future Cutter Wealth shares a framework for defining and recognizing the benefits of a digital strategy. |
| 13:40 - 14:30 | Digital Leaders in Wealth Management <i>Digital leaders push the envelope. They are proactive rather than reactive. Digital leaders aren't simply following the status quo of their peers—they are creating a new status quo.</i> Cutter Wealth takes a close look at the digital strategies and leadership as well as the digital channel use of the world's leading wealth managers and private banks to provide a view into 2019's digital vanguard. |
| 14:30 - 15:00 | Networking Break, Exhibit Hall Open |
| 15:00 - 15:50 | Client Communications: Discuss Current Practices, Future Trends, and Leading Systems <i>Today's market conditions continue to put pressure on wealth managers to produce robust and personalized client communications on a scheduled and ad hoc basis. Client expectations for transparency, aggregated household portfolio reviews, and digital delivery are driving wealth firms to demonstrate ever-greater flexibility and responsiveness in their client reporting and communications function.</i> Cutter Wealth examines member challenges, practices, and future plans for client communications, and the growing importance for adoption of account aggregation. |
| 15:50 - 16:00 | Cutter Wealth in 2019 |
| 16:00 - 17:00 | Cocktail Reception Relax and chat about the day with colleagues over drinks |

*Agenda subject to change