Swissquote Conference 2019 on Artificial Intelligence in Finance

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Title: Re-Thinking The Wealth Management Advisory Cycle through Advanced Analytics and Risk Management tools

Abstract: The Wealth management industry is going through a revolution: financial advisory firms are facing immense pressures from increased client expectations, mounting regulations with higher demand on disclosure and transparency, and fee compression due increased competition, low-fee products and robo-advisors. In this talk, we discuss how sound financial analytics, risk management tools and scenario analysis can be used consistently through the entire client advisory cycle, and allow advisors to understand performance and exposures; create customized portfolios aligned with their clients' multiple goals; and manage risks across the enterprise. Technology, analytics and AI/ML tools will have a great impact on financial advice, but will not eliminate the need of human advisors. These advances will empower advisors to provide transparent value-added advice to their clients, through an enhanced experience that builds long-term trust.