

# Hybrid Advice 2.0

It's no longer about man Vs machine  
It's about man working *with* machine

{ Tue 14<sup>th</sup> June  
14:00 - 15:30 }

{ Wed 15<sup>th</sup> June  
09:30 - 11:00 }

{ Fri 17<sup>th</sup> June  
12:30 - 14:00 }

## What is Hybrid Advice 2.0?

Hybrid Advice 2.0 focusses on the digitisation of the key processes around delivering face to face advice. It's no longer about man versus machine. It's about man *with* machine.

Multiple aspects of the advice process can now be digitised, from onboarding/digital factfinding, advice suitability, communications and interactions, automating report generation, and annual review processes.

Join us to explore the different perspectives around what 'Hybrid Advice 2.0' means to a range of leading edge technology firms providing solutions in the wealth management sector.

## Introduction { 00:00 - 00:10 }



**Event facilitator, Lee Robertson, CEO and Founder**

With over 20 years of experience in the financial services sector, Lee Robertson is an award-winning financial planner and investment specialist. As founder and CEO of Octo Members Group, a private members group for financial service professionals in a dynamic native app, Octo Members aim to facilitate, speak and engage with the financial sector.

## Speed Sessions { 00:10 - 01:10 - 6x }



**Caldon Pike**  
Adviser Growth Lead

### Seccl: An Overview

In this session, Caldon will demonstrate Seccl's API-driven technology, which empowers advisers and DFMs to control their own destiny, own their client relationships and improve their customer experience – by operating their own platform.



**Tessa Lee**  
Managing Director

### Digital Fact Find

In this session, Tessa will demonstrate how to improve client onboarding and review processes using our new Digital Fact Find capability. Allow your clients and advisers to update and complete fact find information on the move, with any smart device they choose to use.



**Ola Abdul**  
CEO

### How technology is changing the game for advisers

Solving problems through technology is often hard, but always worth it. In this session, Ola Abdul, CEO of next generation platform Fundment, dissects the key challenges facing the platform industry, what is being done about them, and why advisers can start to get (just a bit) excited.



**Paul Hogg**  
Senior Business Development Manager

### Increase your AUM by reducing your effort

In the post-covid era where the market has seen an increase in investing, technology can play a big part in increasing your assets under management. Using a simplified digital/hybrid advice process that both engages the consumer and provides them with sensible financial advice, can reduce the time spent with clients whilst also increasing AUM.



**Rebecca McMurry**  
Manager, Enterprise Accounts

### The Adviser's Guide to Supercharging Your Marketing

Rebecca McMurry is the Manager of Enterprise Accounts at AdvisorStream, the highest-rated advisor marketing platform focused on driving growth, revenue and retention by leveraging licensed content from the world's top publishers.



**Tim Walton**  
Senior Fintech/Platform Integration Relationship Manager

### Using technology to your advantage

Aviva provides a significant number of integrated data services across a wide range of software suppliers, this is a key part of the Aviva platform strategy. Accessibility to data is paramount to the success of any business where digital is at the core of the advice business, this is particularly important when it comes to providing Hybrid Advice.



**Rob Tedder**  
UK Account Manager

### AI-Based Planning: The Emperor's New Clothes or the Real Deal?

Can modern AI-based planning technology help your firm save time, increase revenue and enhance the user experience? We will explore alternative ways of delivering advice, using some of the very latest AI assisted capability in the UK market and discuss how this could be deployed in the business.

## Q&A Session & Close



{ 01:10 - 01:30 }

**Lee Robertson, CEO and Founder**