DURATION
(1 DAY)

WEALTHTECH

COURSE OVERVIEW

Intuition has developed a one-day course that looks at the rise of digitalization and the FinTech opportunities for Wealth Managers. First, we discuss how FinTech is disrupting the wealth management model. We examine the new entrants in the private banking industry and look at the rise of the shadow Wealth Managers. Next, we cover some key topics including how to invest in FinTech via cryptocurrency, technology-based companies and FinTech infrastructure. Finally, we investigate possible applications for Blockchain and DLTs in compliance, settlement and regulatory reporting.

This course focuses primarily on business analysis with less emphasis on technology beyond how it works. Please note that delegates do not require programming or coding skillsets for this course.

LEARNING OBJECTIVE

- Digitalization of the Private Banking and Wealth Management industry
- How banks compete with FinTech – resistance or acceptance?
- Cryptocurrency investment
- Blockchain and DLTs – how they work and possible applications in Wealth Management

TARGET AUDIENCE

This course is suitable for RMs and ARMs working in Priority or Private banking, Business Analysts and Risk & Compliance professionals.

COURSE METHODOLOGY

Analysis, Games, Breakout and Case Studies