

A group of four young adults (two men and two women) are captured in a moment of pure joy, jumping and running down a paved city street. They are holding hands and have their arms raised in the air. The background shows modern buildings and lush green trees, suggesting an urban environment. The overall mood is energetic and optimistic.

WELCOME TO THE AGE OF WEALTHCARE

John Robson, CCO



THE EMERGENCE OF WEALTHCARE

A transformation from
wealth management to
wealthcare

From

High-net-worth clients

Pushing product

Channel-led

To

→ Everyone

→ Solving problems

→ Client-centric

WE ALL HAVE NEW EXPECTATIONS

A relationship based on ongoing value, not on transactions

Outcomes. Not product

Customization. Not segmentation

Transparency. Not opacity

Convenience. Not delays

Simplicity. Not complexity

Engagement. Not isolation

TECHNOLOGY WILL ENABLE THIS TRANSFORMATION

\$43tn + 3/4 + 68% = \$16tn

The wealth of mass affluent in Asia by 2020
- *Kepler Canon*

Mobile penetration in APAC by 2020
- *GSMA*

Hybrid advice models VS. traditional advice model
- *Accenture*

Global AUM by digital advice services by 2025
- *Deloitte*

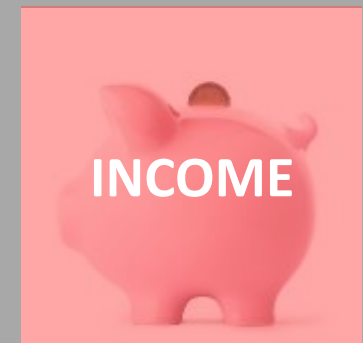
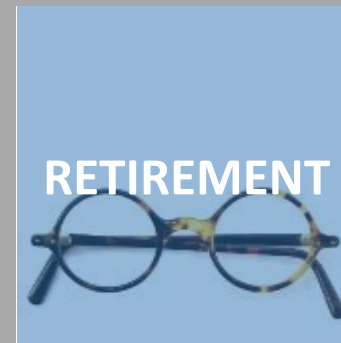
TECHNOLOGY CAN PROVIDE SCALE



But choice on its own does not solve the problem

CRAFTING THE RIGHT DIGITAL EXPERIENCE

Engage with people's
financial goals and
interests



WHO WILL LEAD THE TRANSITION?

Banks, brokers and
insurance companies



Customers

Data

Infrastructure

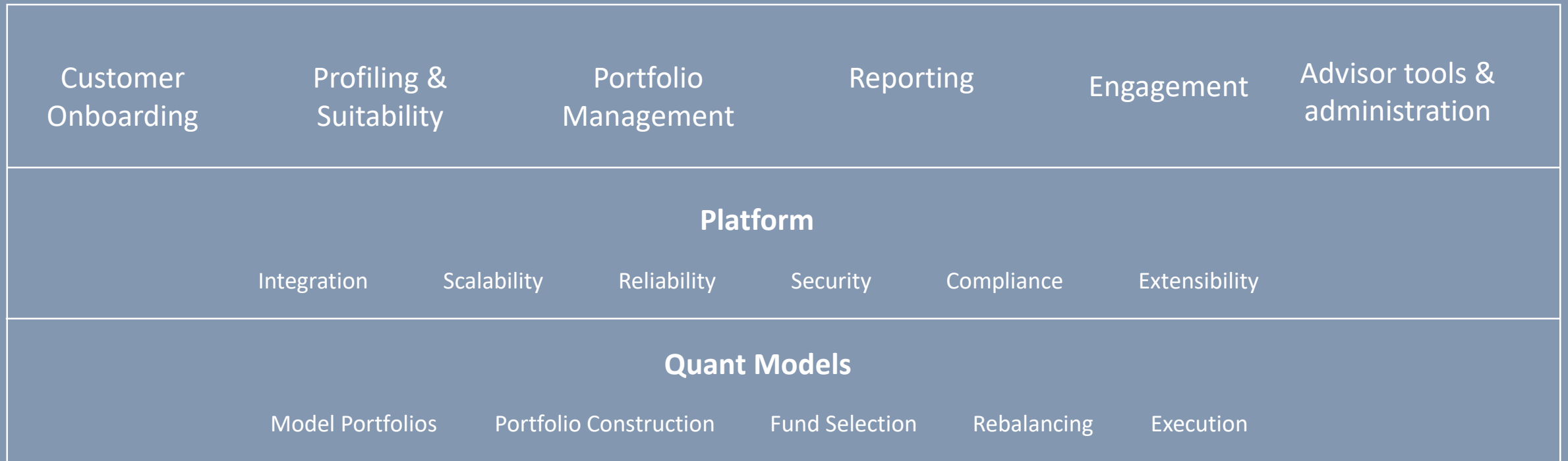
But they need wealth-care technology and expertise



QUANTIFEED

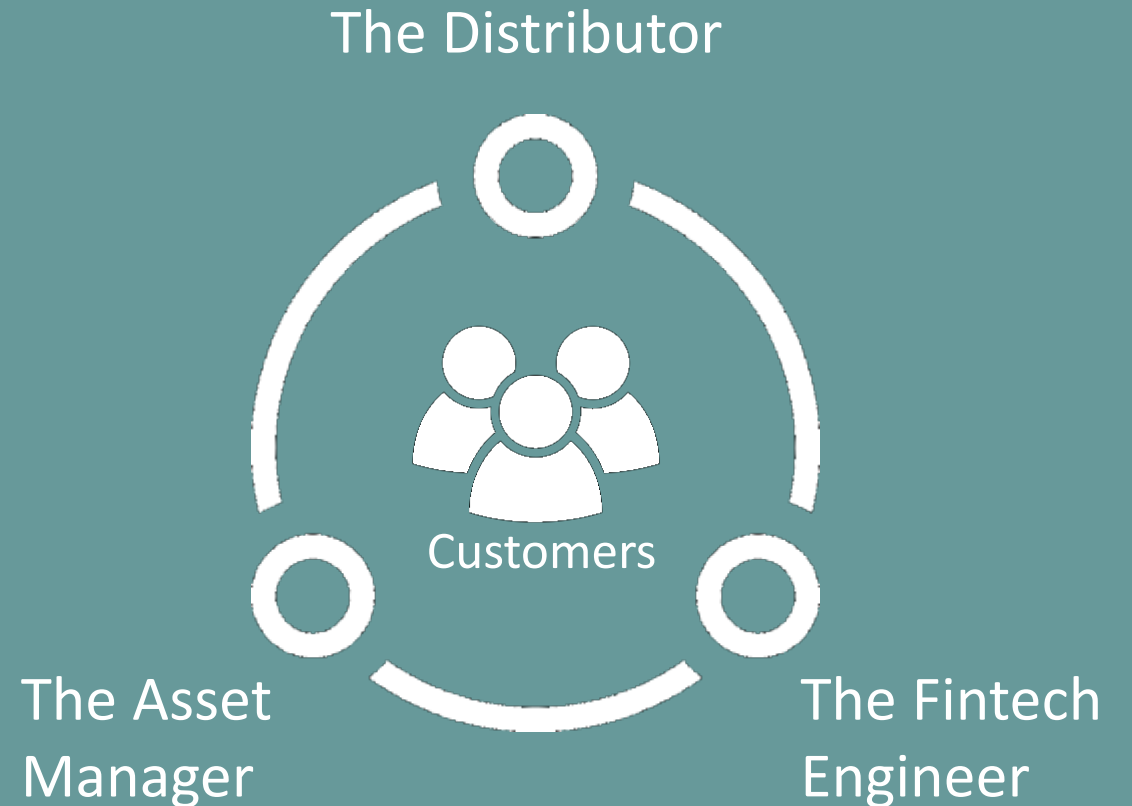
THAT'S WHY WE BUILT QUANTIFEED

Technology-enabled wealth management solutions for financial institutions in the wealth-care age



A WEALTHCARE PARTNERSHIP

Working together to solve the customer's problem



A group of four young adults (two men and two women) are captured in a moment of pure joy, jumping high into the air on a paved city street. They are holding hands, and their arms are raised in celebration. The background features modern buildings and lush green trees, suggesting an urban environment. The overall mood is energetic and positive.

THANK YOU

John Robson, CCO

