

COMARCH

Customer-centricity in Wealth Management

Lessons learned

Grzegorz Proszowicz, PhD

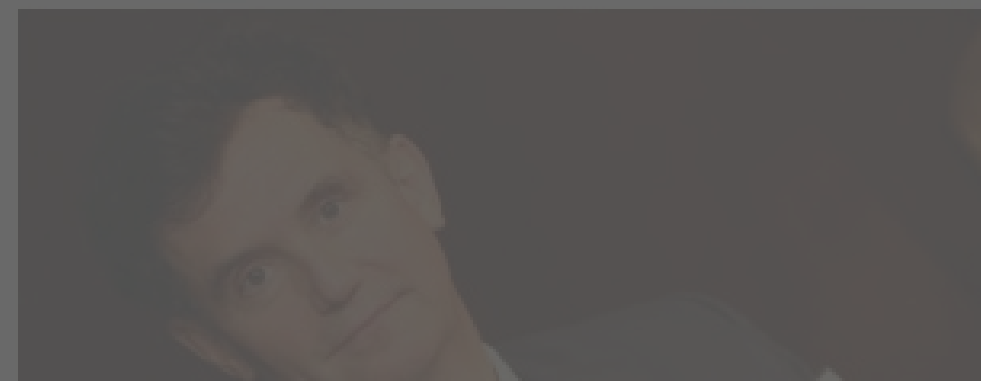
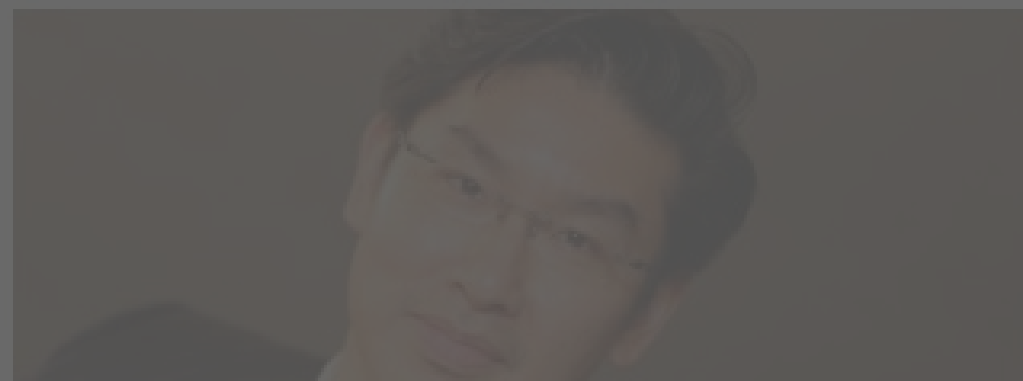
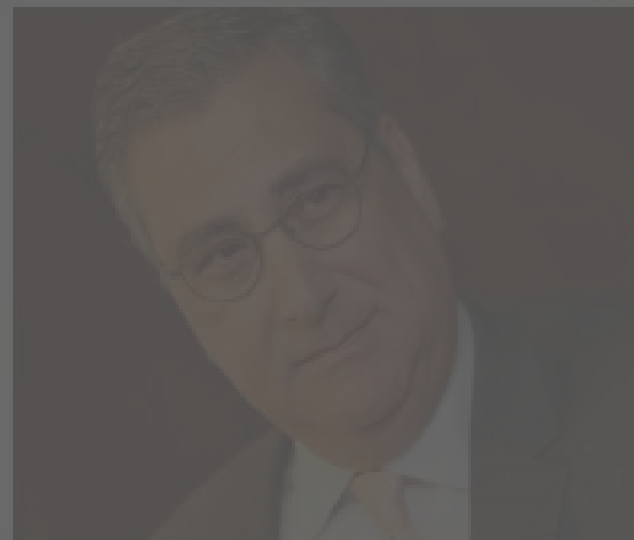
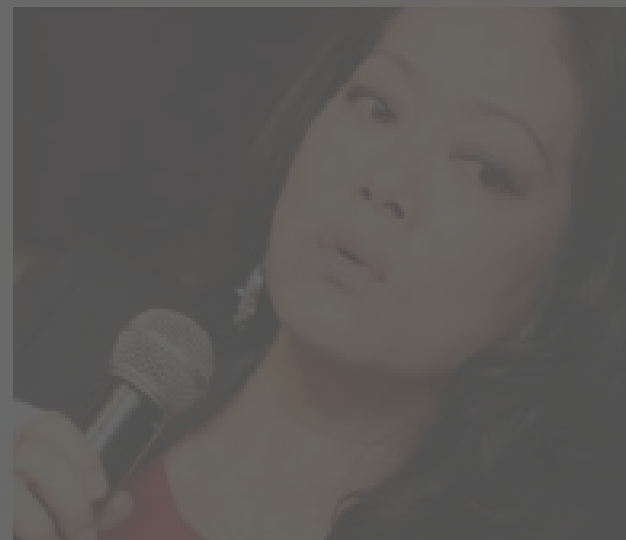
Consulting Director , Comarch

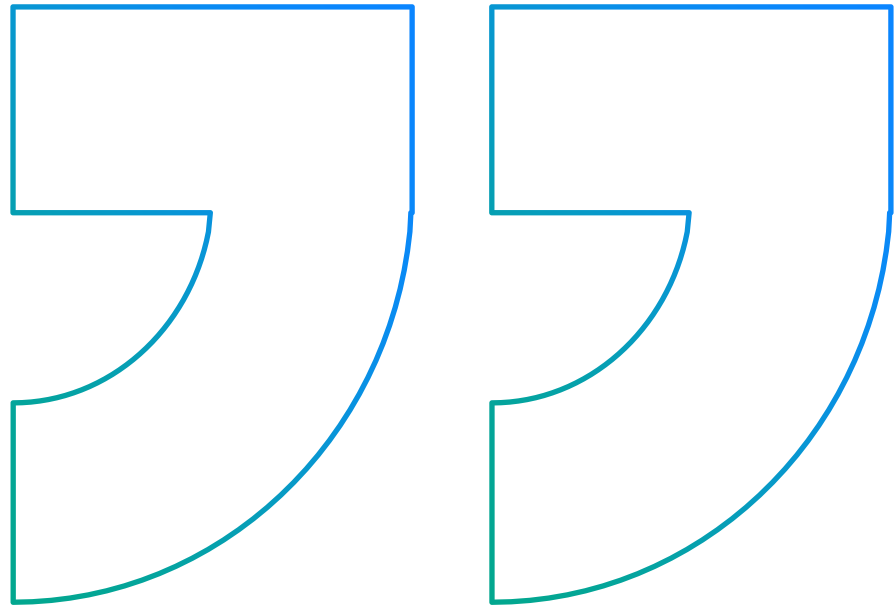
PANEL SPEAKER GUIDELINES

Hubbis is already a gold standard brand in wealth management thought leadership in Asia. 750 leaders and senior practitioners spoke at our forums in 2018. And 7500 colleagues attended our flagship and bespoke events.

Our objective is to bring together senior management from local and international Private Banks, Retail Banks, IFAs, Insurance Companies, Family Offices and other Independent Wealth Management Firms.

**HUBBIS EVENTS ARE -
FUN, CONSISTENT, RELEVANT, ENGAGING AND UNIQUE**





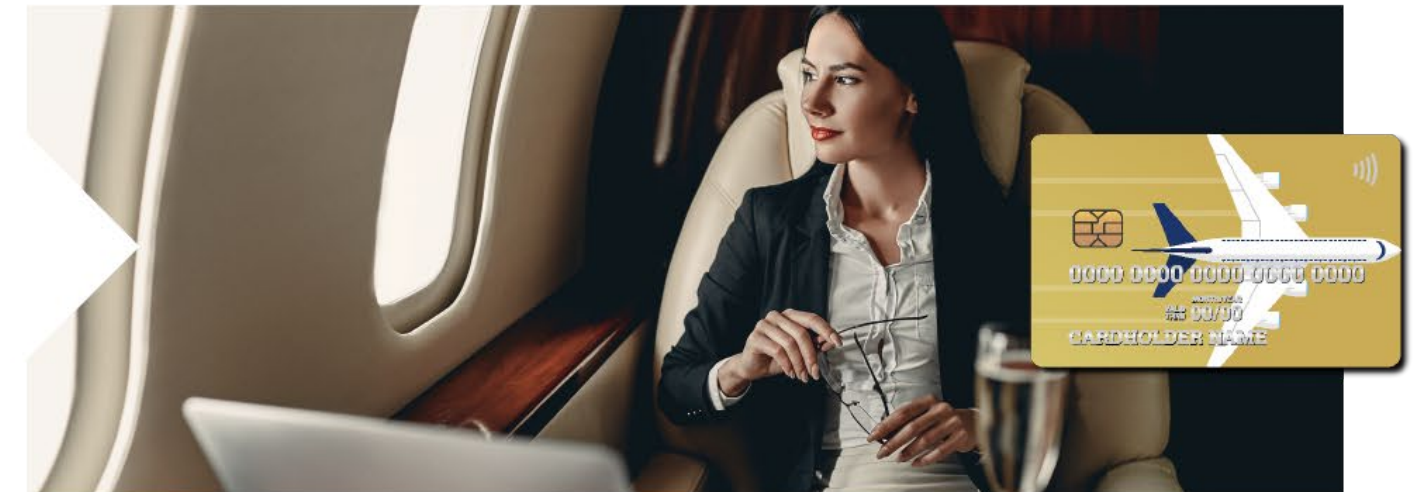
**It's all about the journey, not
a destination...**

Banking of today...



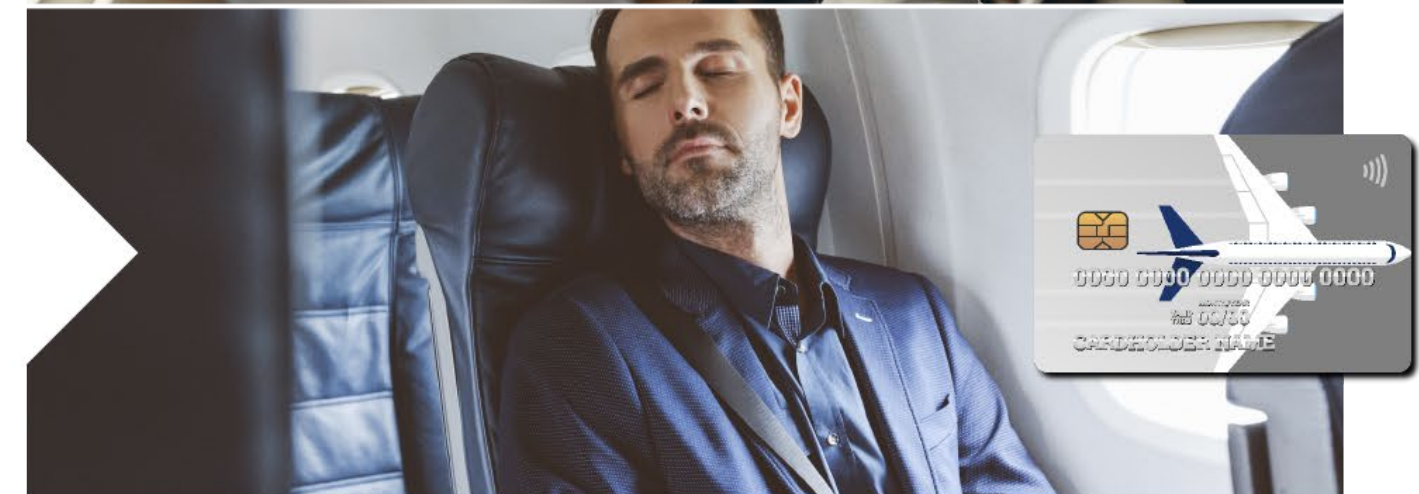
Private banking

First class



Priority banking

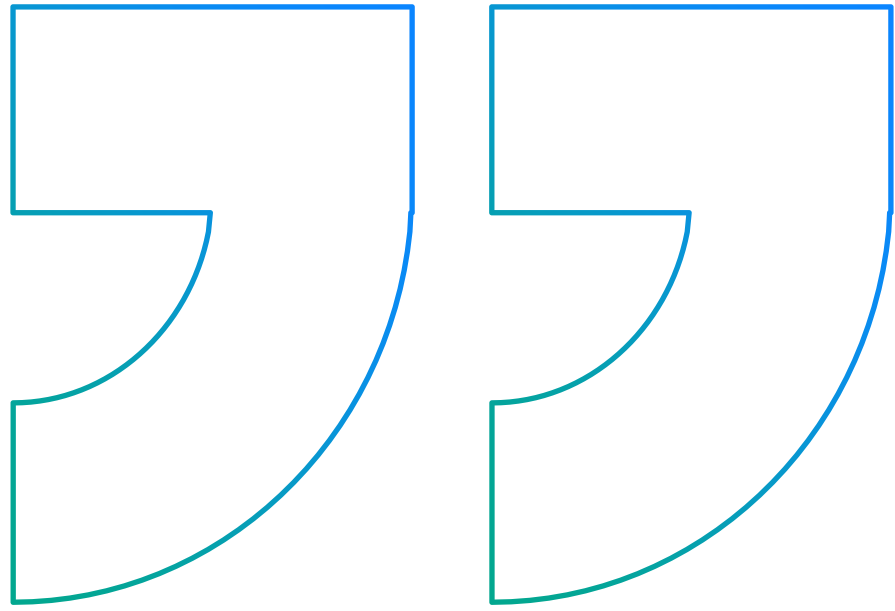
Business class



Retail banking

Economy class

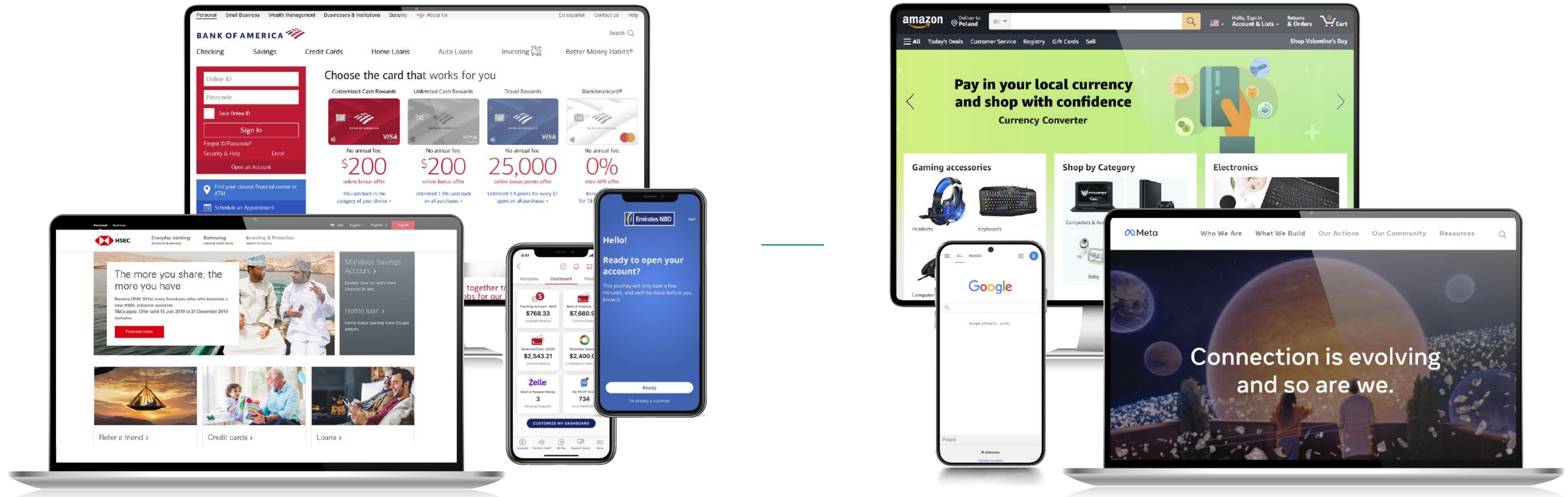




Even if you only purchase
clothes twice a year, you
wear them every day.

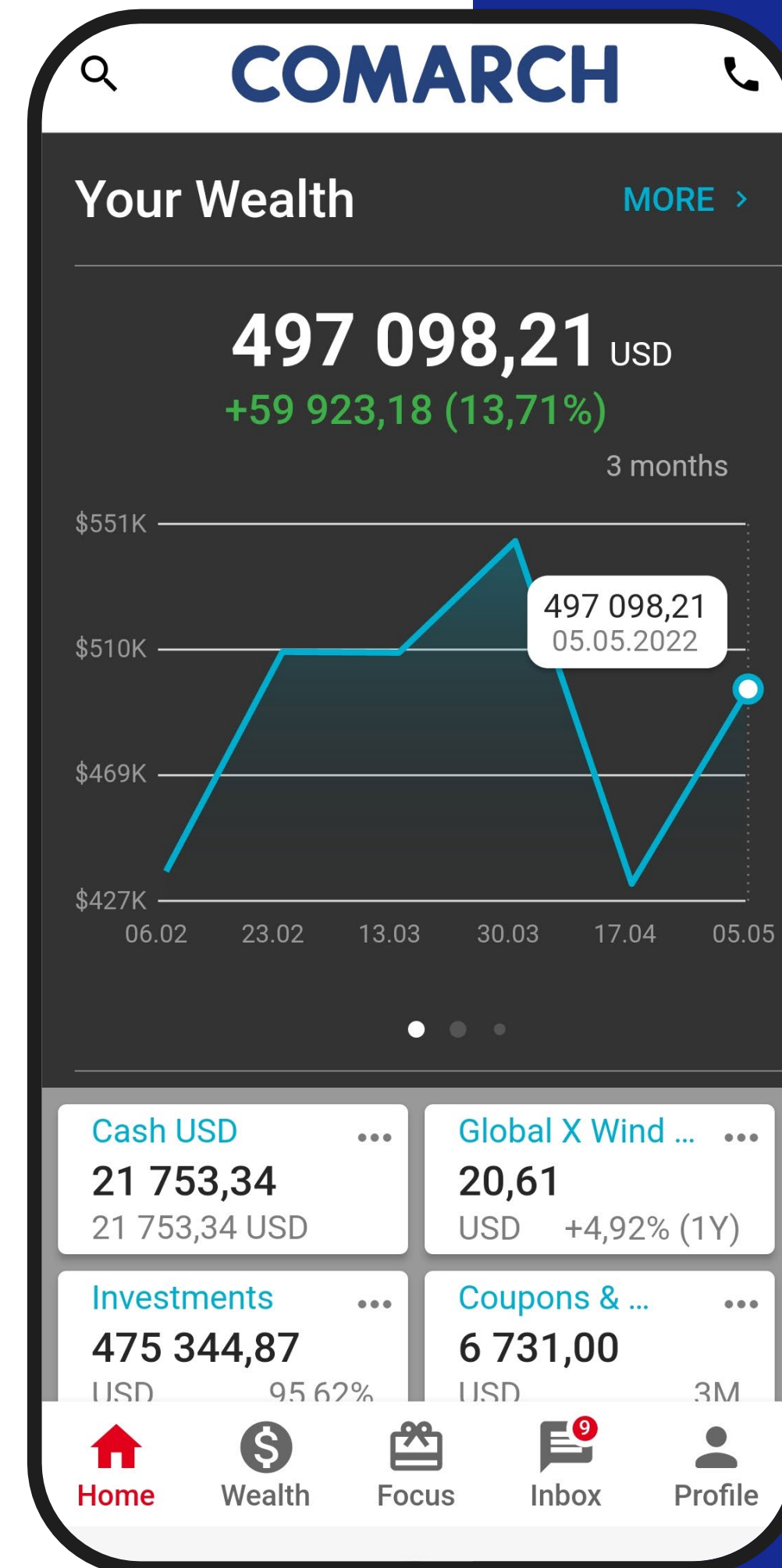
Marc Abraham, BCG

Banking of tomorrow?



Demo

Customer-centric experience
in wealth management



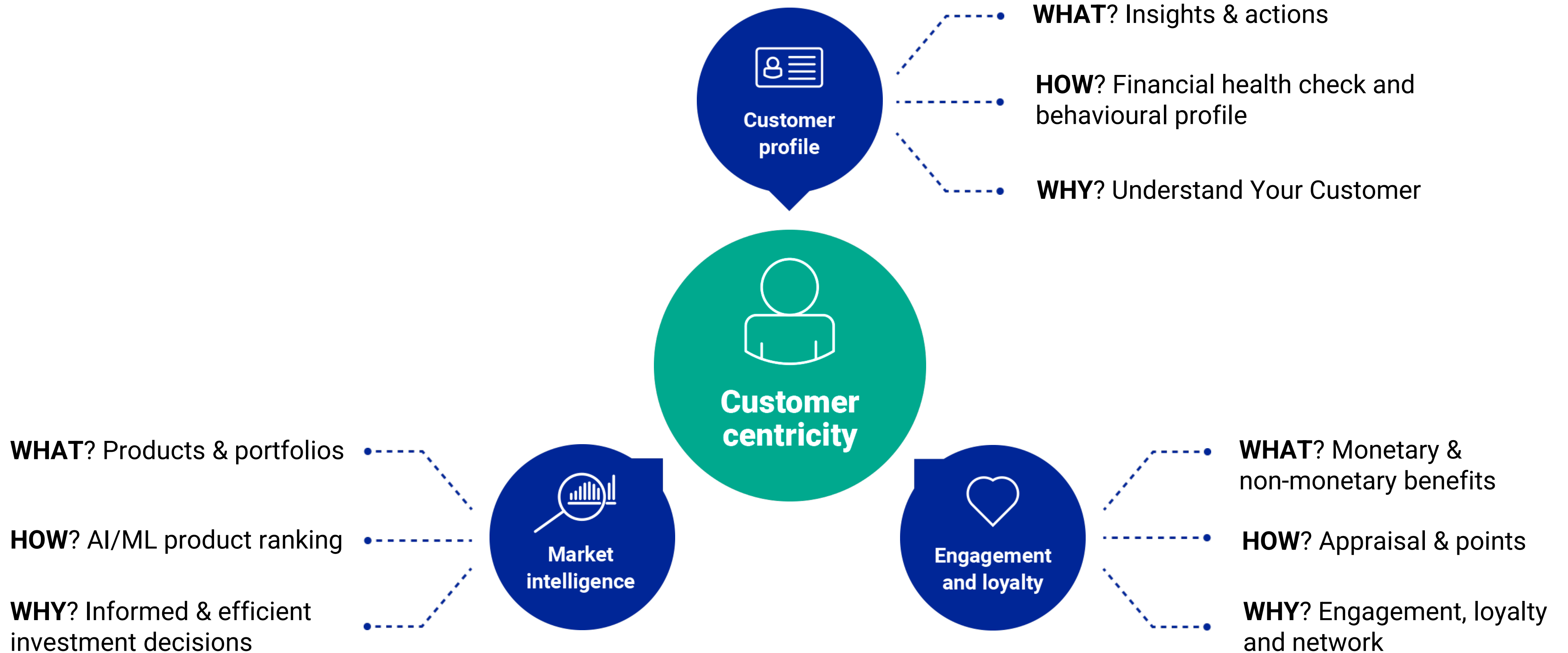
What personalisation the customers expect?

Values.

Expertise.

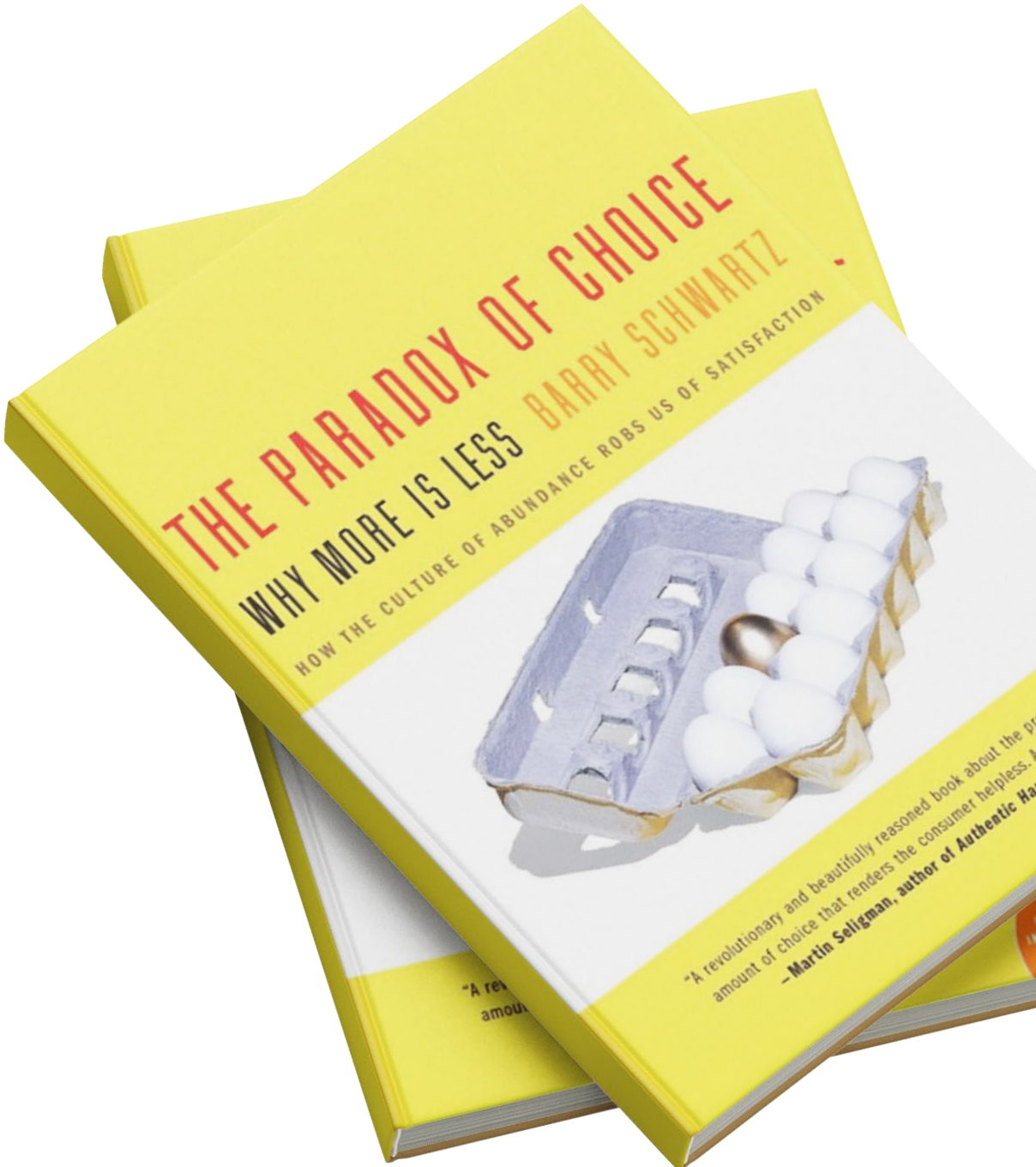
Benefits.

3 Forces Behind Customer Centricity



What's in it for the customer?

Simpler choice



What's in it for the bank?

Customer satisfaction



Summary

1. The old and the new in wealth management – it's not all about money.
2. Values, expertise, benefits - this is what personalization is about.
3. Client-centricity: simpler choice and increased loyalty.



Thank you
