



Building a **Digital-Led** Wealth Platform

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What are the considerations in building a **digital-led** wealth management platform?



Client Experience





Solutions. Not Products.

Hyper Personalisation. Data-driven.

Predict. Pre-empt.



Is the RM model relevant? If so, how do we attract talent, empower and retain clients?

Wealth products are sold rather than bought.

Scale and digital-led empowerment is key to attract RMs

Institutionalise clients relationship and data



What are some of the wealth products and solutions strategy that have evolved in Asia?





Strategic Collaboration. Not Competition.

Converge Retail Bank, Broking and Wealth Business

Open Architecture and No-Ops Design

Recap



What are the considerations in building a **digital-led** wealth management platform?

Recap



**Personalised Journey
Solutions. Not Products**

**Digital-led Empowerment
Data-first Approach**

**Open Partnership
Converge Business Units**

Thank you

