

# croesus — finnovation

2023 EDITION

## Vancouver

October 12, 2023



DISCOVER THE LATEST TRENDS AND INNOVATIONS  
IN WEALTH MANAGEMENT

*Transforming uncertainty into opportunity* is the theme for Finnovation 2023 in Vancouver. Join industry professionals to discuss the issues, trends and possibilities in our industry.

## Finnovation 2023 program

- 12:00 pm

Guest arrival and networking
- 13:00 pm

**Opening remarks and Croesus overview**  
 Sylvain Simpson, *President, Croesus*  
 Annie Sinigagliese, *Vice-President and Chief Product Officer, Croesus*
- 13:30 pm

**Characteristics and opportunities of next generation portfolio management systems**  
 Annik Voyer, *Business Product Leader, Croesus*
- 2:00 pm

**The state of portfolio rebalancing technology**  
 Djaffer Maloufi, *Business Product Leader, Croesus*
- 2:30 pm

Networking break
- 3:00 pm

**Open banking: Wealth management's next growth opportunity**  
 Raghid Nami, *Business Product Leader, Croesus*
- 3:30 pm

**Managing personal information: Tips to avoid a visit by your privacy officer**  
 Susan Copland, *privacy consultant*  
 Annie Sinigagliese, *Vice-President and Chief Product Officer, Croesus*
- 4:00 pm

**Advanced research in WealthTech: What to expect**  
 Maxime Dumas, *Lead Researcher, Technology Innovation, Croesus Lab*
- 4:30 pm

**Closing remarks**  
 Sylvain Simpson, *President, Croesus*  
 Annie Sinigagliese, *Vice-President and Chief Product Officer, Croesus*
- 4:45 pm

Networking cocktail
- 7:00 pm

End of Vancouver Finnovation

## Benefits of participating in Finnovation 2023

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Networking with industry professionals
- 

Discussions on industry trends
- 

Discussions on new technologies
- 

Presentations by industry experts
- 

Answers on Croesus's solutions
- 

Evening cocktail with industry peers



## Who will participate?

- Wealth management professionals
- Investment advisors
- Portfolio managers
- Compliance professionals

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