

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
- 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, Senior Policy Counsel, CIRO
- 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
- 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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finnovation.croesus.com