



GLOBAL DIGITAL BANKING CONFERENCE CANADA EDITION 2017



Winning the customer of the future

Thursday 14th September 2017

One King West Hotel, Toronto

www.globaldigitalbankingcanada.com

This agenda is subject to change

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GLOBAL DIGITAL BANKING CONFERENCE 2017

Global Digital Banking Series

Following the success of RFi Group's 2016 Global Digital Banking Series that toured Dubai, London, Singapore, Melbourne, Toronto and Auckland, we are pleased to announce the second tour.

The Canada Edition taking place in Toronto on 14th September is set to be bigger and better, gathering innovators and thought leaders from around the world to share case studies and engage in panel discussions, focusing on the full range of retail banking.

The agenda will provide key insights into what it takes to improve digital performance across customer experience and satisfaction, how to win the all-important main bank digital relationship and gain greater share of wallet as well as economic, competitive and regulatory factors affecting Canada's retail banking sector.

The day will bring together over 200 banking executives and decision makers to discuss the sector and all that's top of mind for those in retail banking and digital.

Who Should Attend?

C-suite, senior directors and heads of, from banking and technology providers in the following areas:

- Retail Banking
- Digital and technology
- Customer experience
- Lending
- Cards and payment processing
- Branches, distribution, and product development
- Sales and marketing

About RFi Group & Our Events

RFi Group is a global business intelligence and media provider focusing exclusively on financial services.

We specialize in data and information gathering, customer based insight generation and business decision support for the world's leading financial service providers.

With offices in Toronto, San Francisco, London, Hong Kong, Singapore and Sydney, RFi Group consistently provides clients with tailored advice and independent intelligence relevant to their specific market needs.

With a core focus on delivering insightful, valuable and actionable research within the banking sector both locally and internationally, RFi Group's offering covers retail, SME, corporate, investment and private banking.

RFi Group produces over 100 key events throughout the year with an aim to produce quality interactive forums with insightful and relevant debate. We utilize our market insight to produce high-quality industry gatherings that provide attendees with both topical and thought provoking sessions.

Our events are aimed at senior level industry leaders and we secure both national and internationally recognized speakers.

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Agenda

Thursday 14th September 2017

REGISTRATION

08:30 - 9:00AM

Arrival tea and coffee

WELCOME & OVERVIEW

9:00AM

Cyrielle Chiron, General Manager – The Americas, RFi Group

SESSION ONE: GLOBAL AND LOCAL TRENDS IN DIGITAL

Chaired by: Cyrielle Chiron, General Manager – The Americas, RFi Group

Canadian best practice: Driving digital banking forward

9:00 - 9:30AM

- The best in digital banking
- Navigating a culture of innovation
- How to stay ahead of the curve

Ali Razavi, Chief Information Officer, Tangerine

Digital Identity – the latest from the World Economic Forum

09.30 - 10:00AM

- What is digital identity and how are you doing it wrong?
- Identifying the issues with your core identity structure
- Impacts on your digital banking strategy

Jesse McWaters, Financial Lead, World Economic Forum

Where to next in FinTech?

10.00 - 10:20AM

- Macro trends in digital banking
- Canada vs rest of the world
- Barriers to digital and how to overcome

Adam Nanjee, Senior Vice President, Digital Banking, Zafin

TEA & COFFEE BREAK

10:20 - 10:50AM

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SESSION TWO: CUSTOMER EXPERIENCE AT THE CORE

The consumer view: where does consumer trust lie?

10:50 - 11:20AM

- The latest in global distribution trends
- Adoption of new banking technology: AI, virtual reality, biometrics and robo-advice
- Analysis of trust and security issues
- A look to millennials

Charles Green, CEO, RFi Group

The digital-only/branch debate

11.20-12.00PM

- Where are consumer preferences moving?
- Is the branch dead? Or is being reinvented?
- Bridging the gap between human and robot

Moderator: Cyrielle Chiron, General Manager – The Americas, RFi Group

**With: Daniel Eberhard, CEO and Founder, Koho
Shawn Rose, Executive Vice President, Digital Banking, Scotiabank
Robert Hyde, Vice President Payment Services, Payment Source
Ali Pourdad, CEO, Progressa**

PANEL: A stock-take on FinTech

12:00 - 12:45PM

- Beyond the hype, who are the successors and who are the failures?
- How to on-board FinTechs more efficiently?
- Which models are working and which are not integrating well?

Moderator: Oscar Roque, AVP Mobile Platform and Products, Interac

**With: Abdullah Snobar, Executive Director, The DMZ, Ryerson University
Jesse McWaters, World Economic Forum
Andrew Irvine, Head of Business Banking and BMO Partners, Bank of Montreal
Ellis Odynn, Chief AI Officer, Digital Finance Institute**

LUNCH

12:45 - 1:45PM

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SESSION THREE: THE NEWEST TECHNOLOGIES ON THE BLOCK

Mastering money management

1:45 - 2:15PM

- Understanding the psyche of mobile-minded consumers
- The impacts of user experience
- Fee-less banking and impacts on the Canadian financial system
- Steps towards a bigger offering

Phil Barrar, CEO & Founder, Mylo

Learnings from the digitally disrupted sector

2.15-2.45PM

- Digital transformation outside banking
- Putting big data and analytics to work
- Leveraging big data for ultimate customer experience

Dennis Nilsson, Assistant Vice President, Advanced Analytics, TD Insurance

TEA & COFFEE BREAK

2:45 - 3:15PM

SESSION FOUR: DIGITAL BANKING FOR THE FUTURE

Beyond Robos: The Future of Digital Financial Advice

3.15-3.45PM

- Key stages in the evolution of the digital advice market
- What's been surprising so far, what surprises lie ahead
- Longer-term implications of putting the customer at the centre of the process

Amelia Young, Principal, Upside Consulting Group

PANEL SESSION: Becoming a bank of the future

3:45 - 4.30PM

- What exactly do customers want for the ultimate banking experience?
- Innovations in voice, ML and the latest technologies
- Artificial intelligence – comprehending the value of data
- How to build a digital workforce?

Moderator: Andrea McMullen, President, ACT Canada
With: Ruby Walia, Vice President, Mobile and Online Banking, TD Bank
Christopher Higgs, Vice President, Digital Development & Support, Royal Bank of Canada
Phil Barrar, CEO & Founder, Mylo
Dan Dickinson, Chief Digital Officer, EQ Bank
Jeremy Fisher, Head of Product, Securefact

CLOSING REMARKS

4.30PM

Cyrielle Chiron, General Manager – The Americas, RFi Group

NETWORKING

4.30-5.30PM