



# GLOBAL DIGITAL BANKING CONFERENCE CANADA EDITION 2017



## Winning the customer of the future

Thursday 14<sup>th</sup> September 2017

One King West Hotel, Toronto

[www.globaldigitalbankingcanada.com](http://www.globaldigitalbankingcanada.com)

*This agenda is subject to change*

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# GLOBAL DIGITAL BANKING CONFERENCE 2017

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## 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 14<sup>th</sup> 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.

# GLOBAL DIGITAL BANKING CONFERENCE 2017

## 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: CUSTOMER-CENTRICITY IN PRACTICE

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

#### A case-study in “Fintegration”

**9.00-9.30AM**

**Linda Duncombe**, Managing Director and Head of Growth, Chief Marketing Officer Citi FinTech, Citi (USA)

#### Driving digital banking forward – Canadian keynote

**9:30 - 10:00AM**

- 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

**10.00 - 10:20AM**

- 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

### TEA & COFFEE BREAK

**10:20 - 10:50AM**

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## SESSION TWO: CANADIAN CASE-STUDIES OF INNOVATION

### The consumer view: where does consumer trust lie?

10:50 - 11:20AM

- The latest in global distribution trends
- The global FinTech index – appetite and bite
- Adoption of new banking technology: AI, virtual reality, biometrics and robo-advice
- Analysis of trust and security issues
- Who will win?

**Mark Schultz, Head of Client Insights - Canada, 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 Ebedherd, CEO and Founder, Koho  
Shawn Rose, Executive Vice President, Digital Banking, Scotiabank  
Trevor Cook, CEO, Payment Source**

### PANEL SESSION: A stock-take on FinTech

12:00 - 12:40PM

- 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: Debbie Gamble, VP Digital products and Platforms, 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

12:40 - 1:40PM

## SESSION THREE: THE NEWEST TECHNOLOGIES ON THE BLOCK

### Mastering money management

1:30 - 1:50PM

- 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**

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## SESSION THREE CONT'D: THE NEWEST TECHNOLOGIES ON THE BLOCK

### PANEL: Encouraging investment and financial health through CX

- The powers of robo-advise

1:50 - 2:30PM

### PANEL: The right key for digital authentication

2:30 - 3:00PM

*To be announced*

## TEA & COFFEE BREAK

3.00-3.30PM

## SESSION FOUR: OVERCOMING THE ROADBLOCKS

### Learnings from the digitally disrupted sector

3.30-3.50

- 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**

### The challenge of building a digital workforce

3:50 - 4:15PM

### PANEL SESSION: Becoming a bank of the future

4:15 – 5.00PM

- What exactly do customers want for the ultimate banking experience?
- How to keep on top of consumer needs?
- Artificial intelligence – comprehending the value of data
- The ethical debate surrounding data

*With:*

**Ruby Walia, Vice President, Digital Channel, 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*  
*Peggy Van de Plassche, VP Innovation, CIBC*

## CLOSING REMARKS

5.00PM

**Cyrielle Chiron, General Manager – The Americas, RFi Group**

## NETWORKING

5.00-6.00PM