AI in Financial Services Forum

Join 200+ senior Financial Services and AI experts to get a no-nonsense view on how the sector is really being impacted by AI: from the possibilities of Gen AI, cost reduction through tech, privacy concerns, data inputs and much more!

21 November, 2024	
TIME	**SESSION**
8.00	**REGISTRATION & NETWORKING BREAKFAST**
8.55	Chair's Welcome & Introduction
9.05	Opening Remarks from the FCA **Speaker:** Sholthana Begum, Chief Data Officer, FCA
9.20	Keynote Panel - The Leader's Perspective: What role will AI play in the next decade? 1. What are the priorities for leaders when it comes to AI? 2. As of today, what impact is AI having on the day-to-day operations within your firms and how will this change in the next 5 years? 3. What are the biggest hurdles to wider adoption of AI in financial services? 4. What are the new roles that AI augmentation can help create? 5. How can we prepare workforces for the evolving skillsets needed to work with AI? 6. What worries you most about the role of AI in the next decade? **Moderator:** Claire George, Chief Technology and Operating Officer, Savills Investment Management **Speakers:** Jacek Wieclawski, Global Head of Innovation, Rabobank Rob Garlick, Head of Innovation, Technology & the Future of Work, Citi Global Insights

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10.10	Keynote Presentation: LLMs in Finance: Real-World Applications for Financial Services (the fastest way to a defined benefit) Richard Keirnan, Global Head of AI & Machine Learning Platforms, Natwest RBS Group
10.30	Presentation: GenAI Use Cases in Finance: From PoC to Production Dimitris Emmanoulopoulos, Director, Head of Machine Learning Technologies, Barclays
10.50	**NETWORKING BREAK**

11.25	Panel Discussion 2: AI at Your Service – Revolutionising Customer Experience in Financial Services
	    1. Intro to AI personal experience of panellists as ice breaker for audience
	    2. How to assess your client fluency and desire for AI?
	    3. Security and data governance risks associated with AI presentation services
	    4. How can KPIs be implemented?
	    5. Beyond tech, how does the operating model change?
	    6. Looking ahead – how do you see the future of AI within CX?
	
	Moderator:
	
	Lily Li, New York President, Columbia Venture Community
	
	Speakers:
	Nombuso Matsape, Head of Technology Business Engagement, ICBC Standard Bank Plc
	
	Warren Macdonald, Digital Transformation Executive, ex-Mastercard
	
	Dion Kraanen, MD Data, Analytics & AI, Brightstone

12.10	Panel Discussion 3: Data Dilemma – Unleashing the Power of Data for AI in Financial Services
	    1. How do you design data architecture and management to facilitate AI?
	
	    2. What are some of the data quality challenges when wanting to implement AI?
	
	    3. How can FIs foster a data-driven culture between departments to unlock siloed data?
	
	    4. What are the ethical considerations when it comes to hallucinations?

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	Moderators: Aria Goudarzi, SVP Head of ESG Data, Neuberger Berman **Speakers**: Aitor Muguruza, Chief Artificial Intelligence Officer, Kaiju Jonathan Loo, Head of CIB and International Reporting, Analytics, and Insights, Wells Fargo Yi Wang, Data Science Senior Manager, Lloyds Banking Group James Coveney, Head of Data Science, Zempler Bank
12.55	**NETWORKING LUNCH**

14.00	Panel Discussion 4: Navigating Compliance Challenges with the help of AI
	    1. How can AI enhance compliance while reducing operational costs?
	    2. Where do we stand in the AI arms race vs financial criminals?
	    3. What role does AI play in KYC?
	    4. How can regulatory change be enhanced with AI?
	    5. What are the key challenges FIs face when integrating novel tech into compliance frameworks?
	
	Moderator:
	Annie Danhe-Ren, Global Head of Markets Central Controls Testing, Citi Bank
	
	Speakers:
	Astitva Karunesh, Product Owner AI & Data Science CoE, Lloyds Banking Group
	
	Swagatam Sen, Executive Director FCC Tech Advisory, Santander Corporate & Investment Bank
	
	Tania Amin, Head of Audit for Standard Audit Compliance and Fraud, Standard Chartered Bank
	
	Mandy Rawlinson, Head of Client Risk & Governance, abrdn

14.40	Fireside Chat: Future Proofing Risk Management - How can we determine the appropriate level of augmentation for specific risk managers? - Which types of decision making are augmented machine learning models best suited to? - How is predictive AI currently used in processes such as risk modelling and credit underwriting? - Given the unique complexity of FS, what tools and methods are available for ensuring the robustness of AI and ML models?

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	What is the potential for Generative Adversarial Networks in risk management? **Moderator**: Parul Kaur-Green, Founder / CEO, Eudaimon Consulting **Speakers**: Prab Bajwa, Managing Director Senior Digital Asset Risk Officer, State Street
15.20	**NETWORKING BREAK**
15.50	Panel Discussion 6: AI and the Regulators - Striking a Balance Between Innovation and Safety - What is the importance of transparency and explainability when using AI systems in finance? - Are AI regulations such as the EU AI Act fostering or restricting innovation in Financial Services? - How do regulations like GDPR impact the use of data in AI for financial services? - How can Financial Institutions effectively keep up with financial criminals? **Moderator**: Kalliopi Letsiou, Researcher, Cambridge SupTech Lab **Speakers**: Richard Keirnan, Global Head of AI & Machine Learning Platforms, Natwest RBS Group Andrew Thomsen, Group Manager Competition and Regulatory Cooperation, ICO
16.30	Chair's Closing Remarks
16:45	**NETWORKING RECEPTION**
17:45	**END OF SUMMIT**