


The Future of Asset Management

01 November 2018

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Amin Rajan

CREATE-Research

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Foundational trends in the UK asset industry



Amin Rajan

Six super tanker trends transforming the UK asset management over the next five years

1. The continuing rise of passive funds

- Rates lower-for-longer
- Part of core portfolio

2. Regulatory creep over time

- Value for money
- Extra fiduciary responsibility for NEDs

3. Rise of ESG

- Risk management tool
- Regulatory requirements

4. Demographic shifts

- Pension freedoms
- Rise of millennials

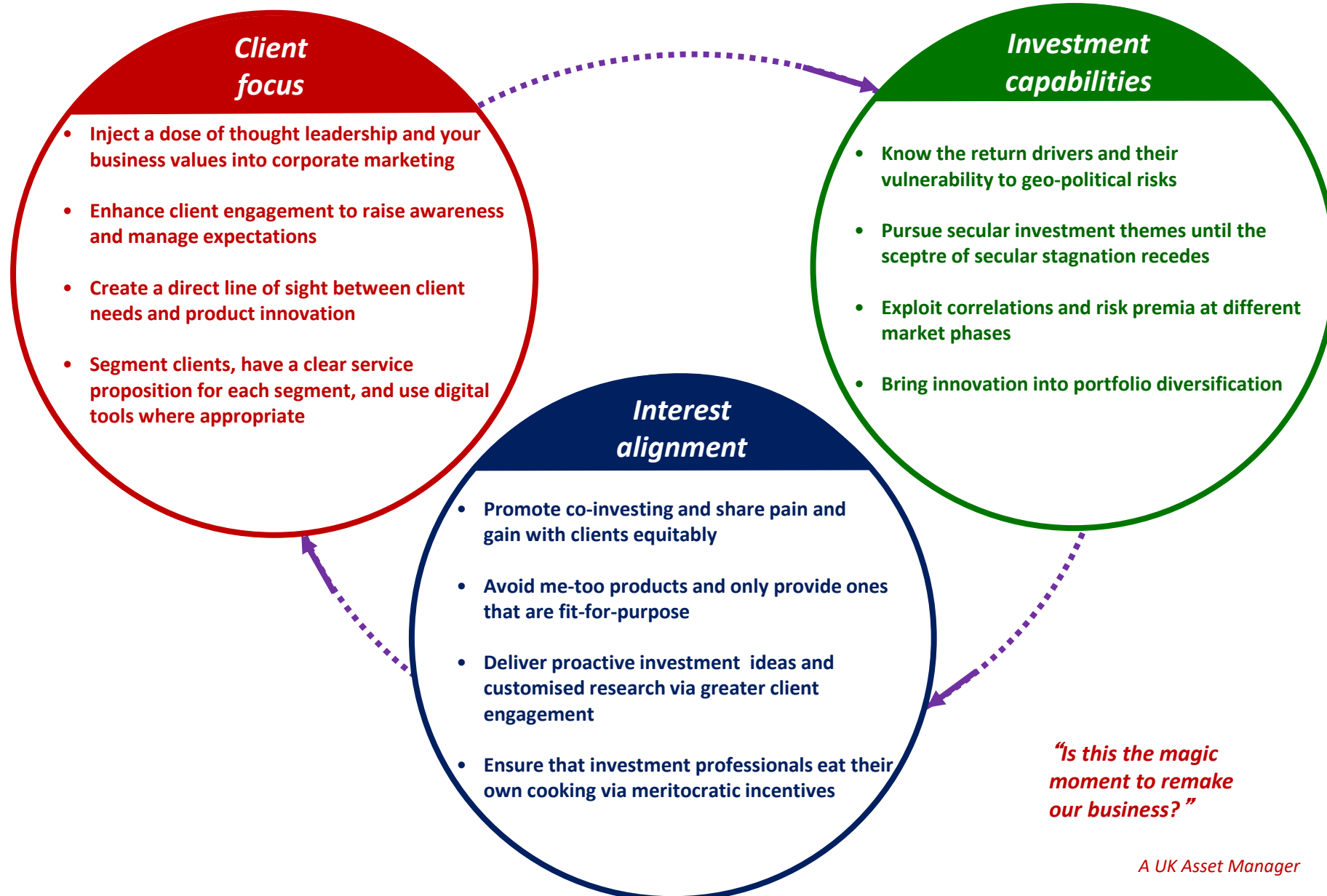
5. Digitisation of the investment value chain

- Third way of investing
- Rise of brands in the age of commoditisation

6. Gradual bifurcation in distribution

- Direct selling
- Third party channels

Which aspects do investors want their asset managers to improve?



A UK Asset Manager


Thought for the day

Brand means a promise kept.

Magnus Spence

Broadridge Financial Solutions, Inc.

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London, November 1st 2018

Financial Services Forum

The Future of Asset Management

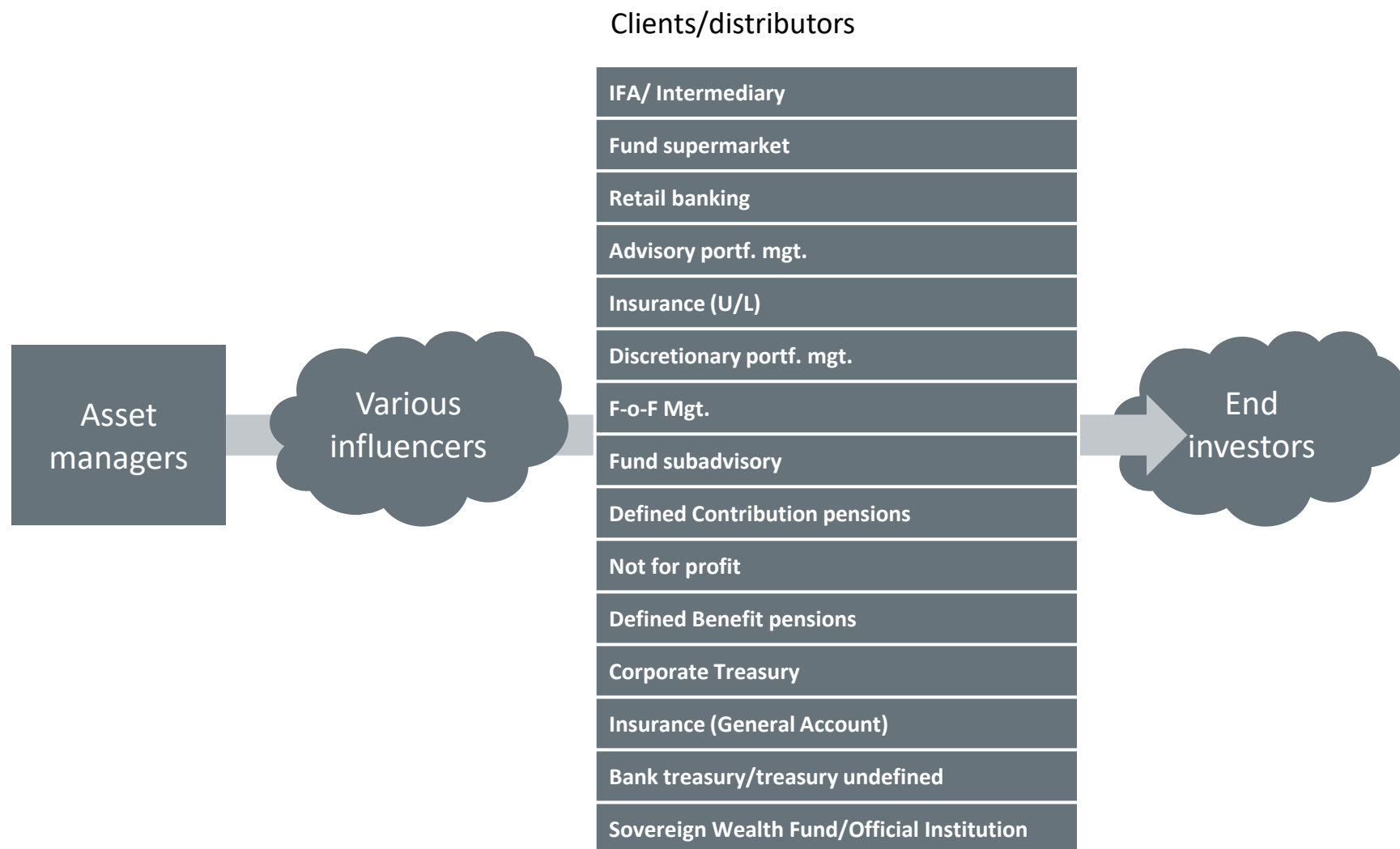
Retail vs Institutional. Is it time for a new marketing approach?



Magnus Spence

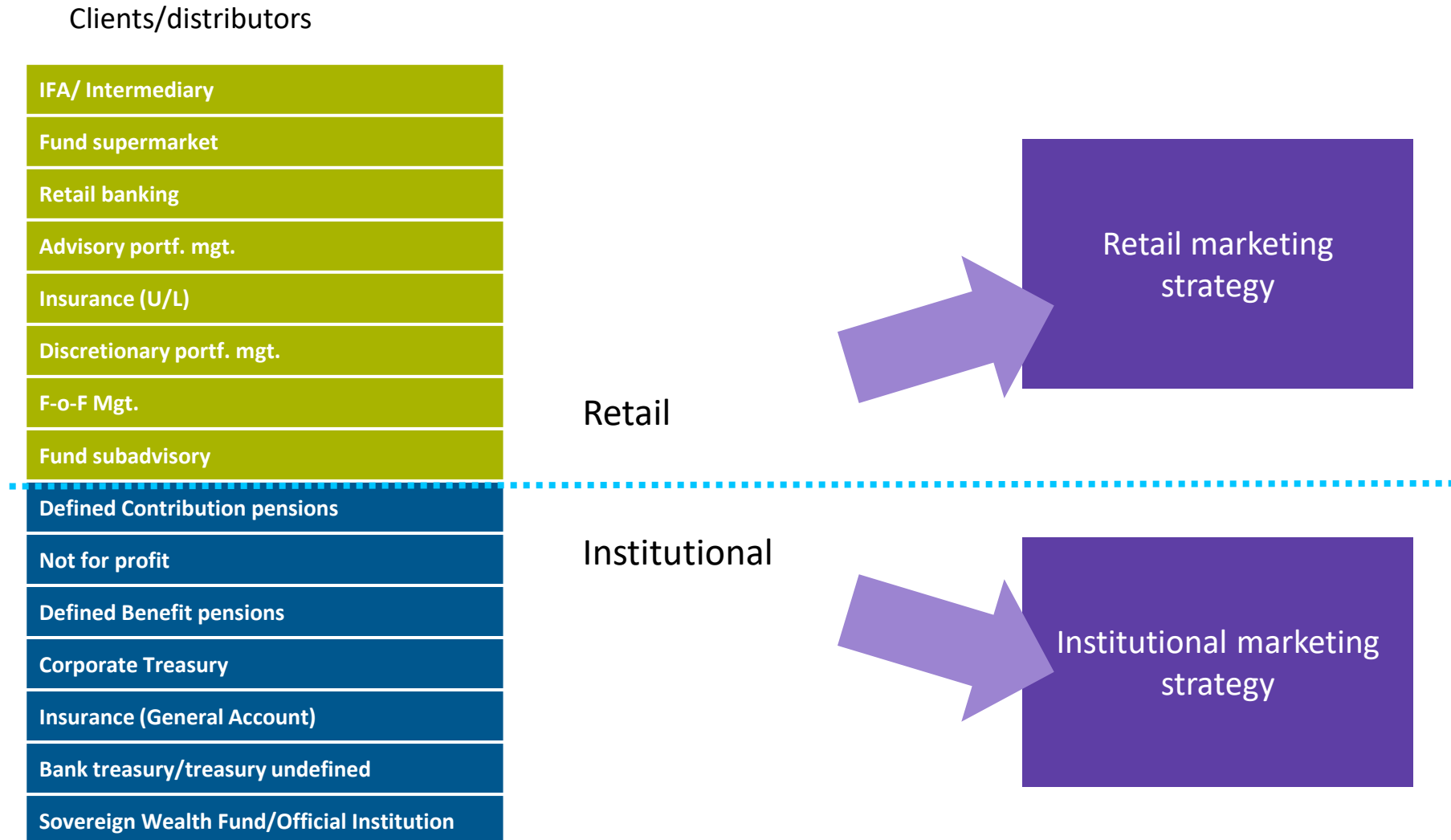


There is a wide range of clients/distributors who sit in the value chain



Source: Broadridge Analysis

A typical retail/institutional split, which drives twin marketing strategies



Source: Broadridge Analysis

This approach assumes differences in behaviour by price, product etc

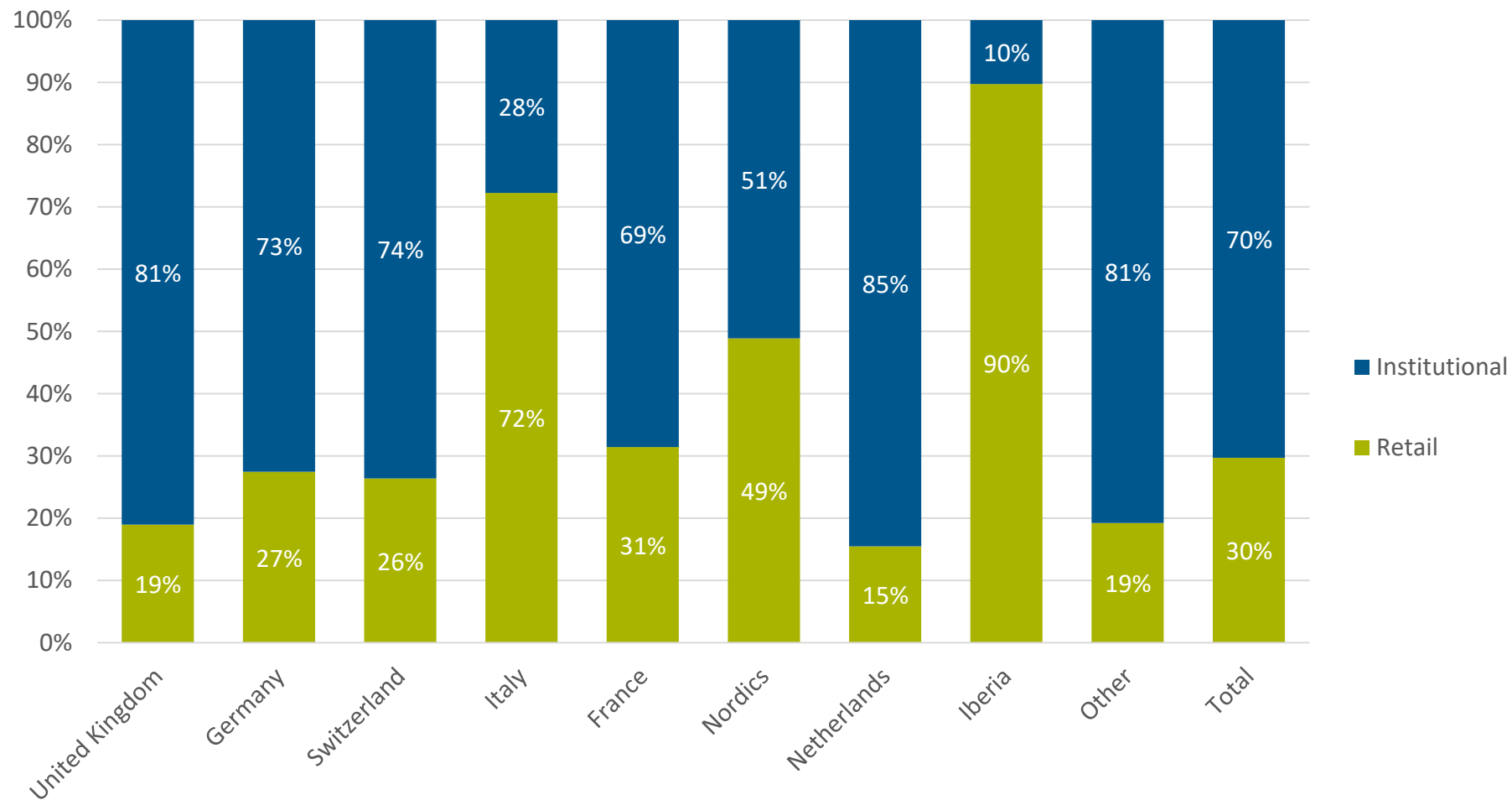
	Clients/distributors	Price	Product	Service	Distribution economics
Retail	IFA/ Intermediary	High	Plain vanilla, Funds	High volume	High headcount, low complexity
	Fund supermarket				
	Retail banking				
	Advisory portf. mgt.				
	Insurance (U/L)				
	Discretionary portf. mgt.				
	F-o-F Mgt.				
	Fund subadvisory				
Institutional	Defined Contribution pensions	Low	Sophisticate, Mandates	High maintenance	Low headcount, high complexity
	Not for profit				
	Defined Benefit pensions				
	Corporate Treasury				
	Insurance (General Account)				
	Bank treasury/treasury undefined				
	Sovereign Wealth Fund/Official Institution				

Source: Broadridge Analysis

The retail/institutional distinction provides significant insight/1

Q4 2017 EMEA Third party managed Fixed Income AuM Total €4,053bn

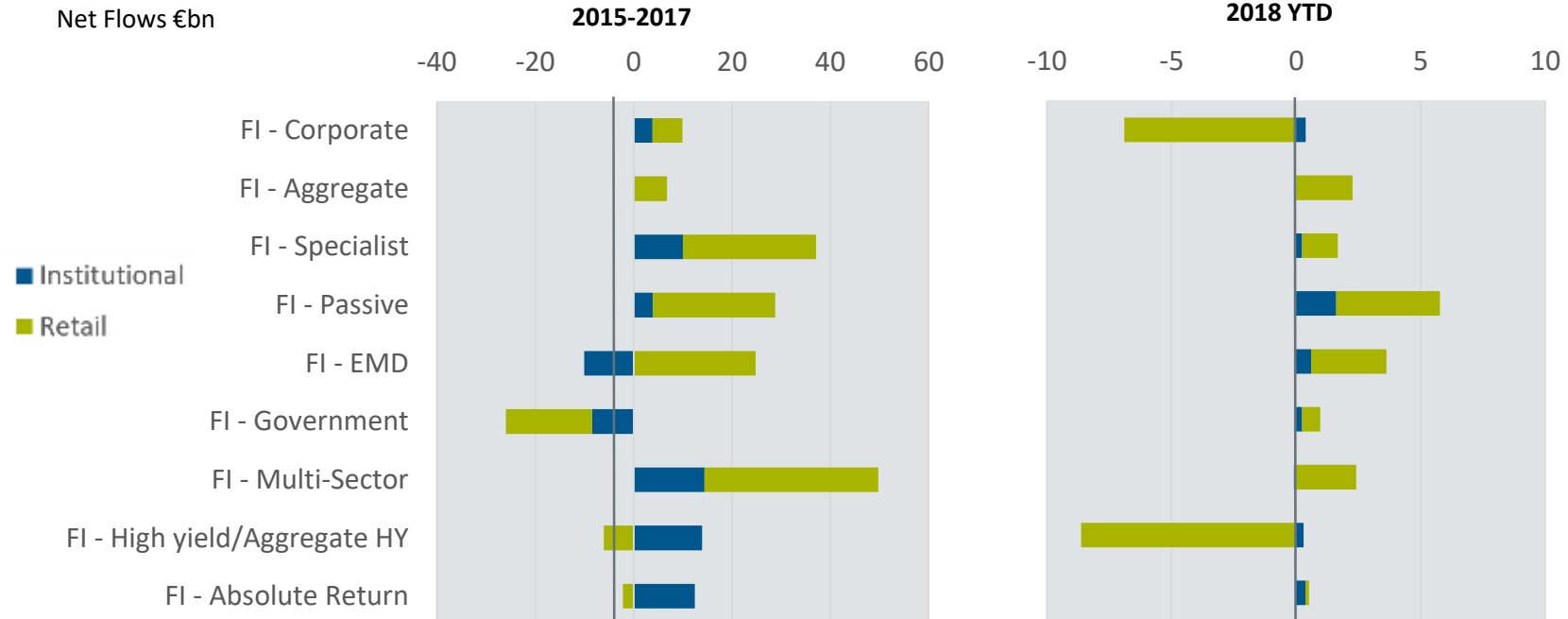
By client type in summary



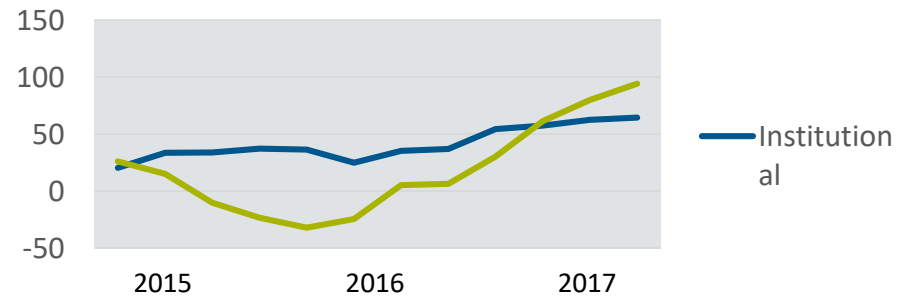
Source: Broadridge FI Forecast Model, Broadridge GMI (MIM, Fundfile, Saleswatch)

The retail/institutional distinction provides significant insight/2

Third party fixed Income EMEA
Net Flows €bn



Cumulative net flows 2015-2017 €bn



Source: Broadridge FI Forecast Model, Broadridge GMI (MIM, Fundfile, Saleswatch)

Increasingly the dividing line is shifting as we see more 'institutionalisation'

	Clients/distributors	Price	Product	Service	Distribution economics
Retail	IFA/ Intermediary	High	Plain vanilla, Funds	High volume	High headcount
	Fund supermarket				
	Retail banking				
	Advisory portf. mgt.				
	Insurance (U/L)				
	Discretionary portf. mgt.				
Institutional	F-o-F Mgt.	Low	Sophisticate, Mandates	High maintenance	Low headcount
	Fund subadvisory				
	Defined Contribution pensions				
	Not for profit				
	Defined Benefit pensions				
	Corporate Treasury				
	Insurance (General Account)				
	Bank treasury/treasury undefined				
	Sovereign Wealth Fund/Official Institution				

Source: Broadridge Analysis

But hold on – drill down and you find that scale is the key driver of behaviour

Within UK DC there are lots of small schemes and a few larger ones

NO. SCHEMES BY SIZE (MEMBERSHIP) AND TYPE

Q4 2016

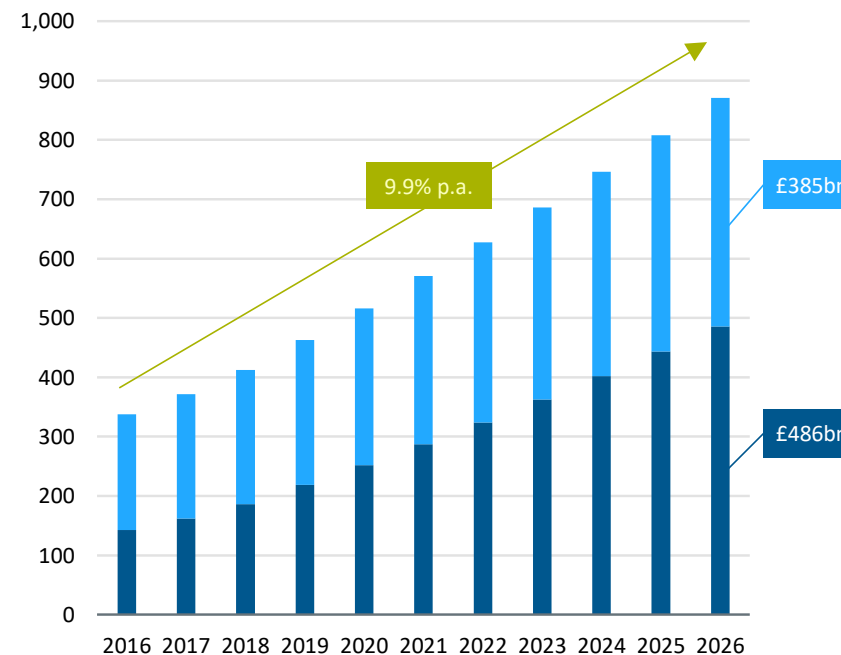
	Mega >5,000	Large >1,000	Medium >100	Small <100	
Master trust*	47				47
Trust-based unbundled	50	114	171	15,786	16,121
Trust-based bundled	47	176	1,056	17,554	18,833
Contract-based	117	882	36,627	132,892	170,517
	261	1,172	37,854	166,232	205,518

■ 'Institutional' DC schemes
■ 'Retail' DC schemes

Growth will come mostly from the larger schemes

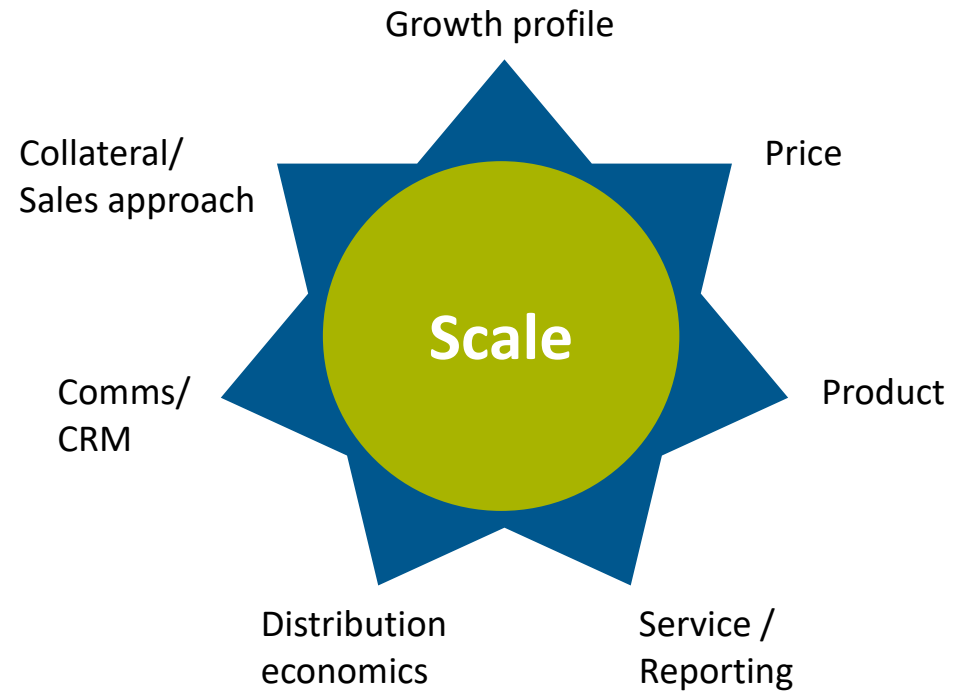
TOTAL UK DC ASSETS

£bn, 2016-2026



Source: Broadridge DCRI Market Intelligence 2017

Scale is actually the main driver of behaviour and resulting AM approaches

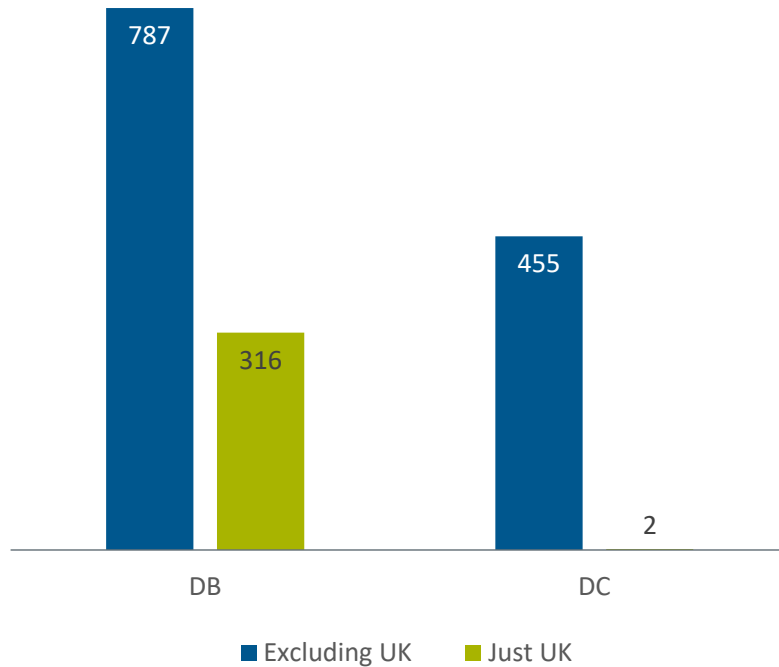


Source: Broadridge Analysis

(Bear in mind that the UK is unlike rest of Europe in terms of scale)

The UK pensions industry is mostly subscale...

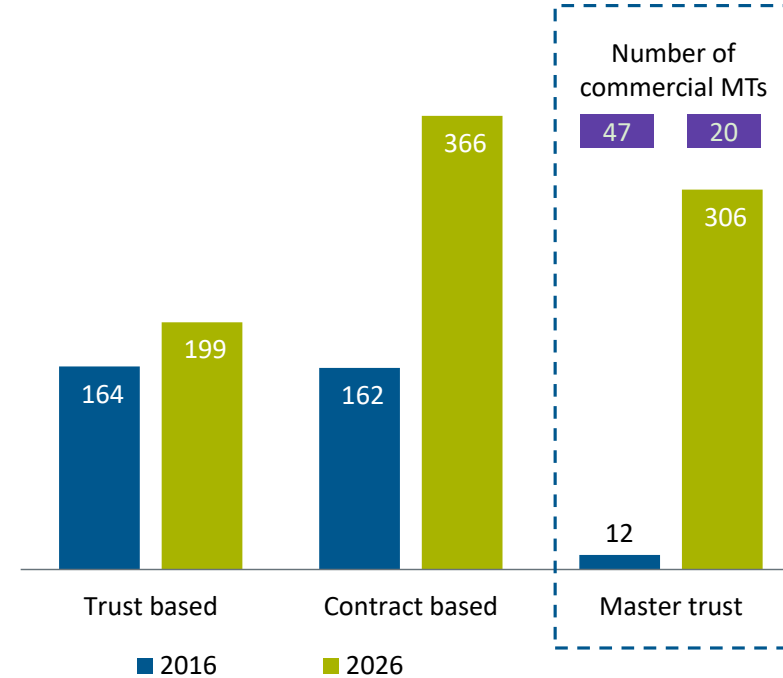
Average size of European pension schemes 2015
€m



Source: Broadridge MI

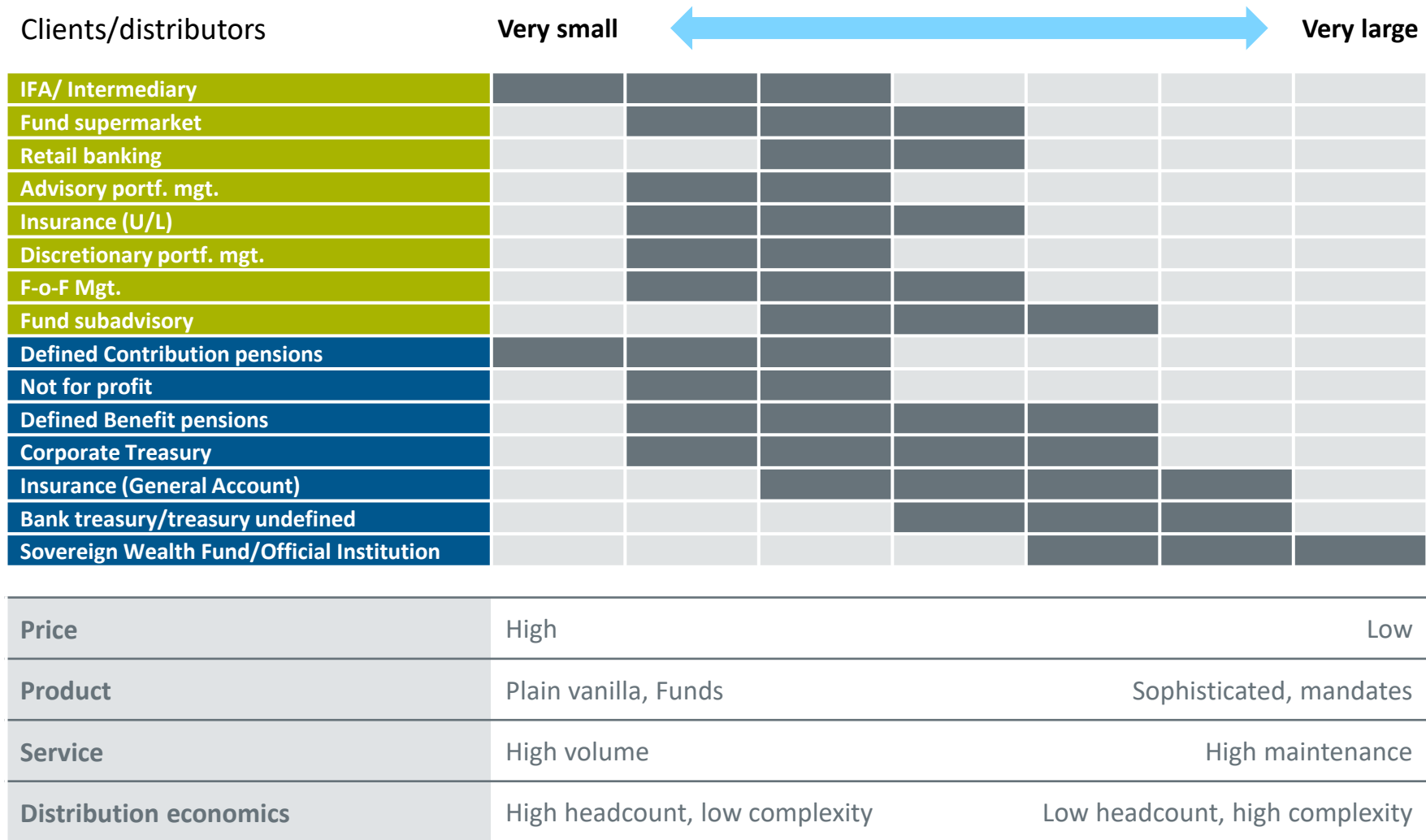
...But this is changing

UK DC projected asset growth 2016-2026 by segment
£bn



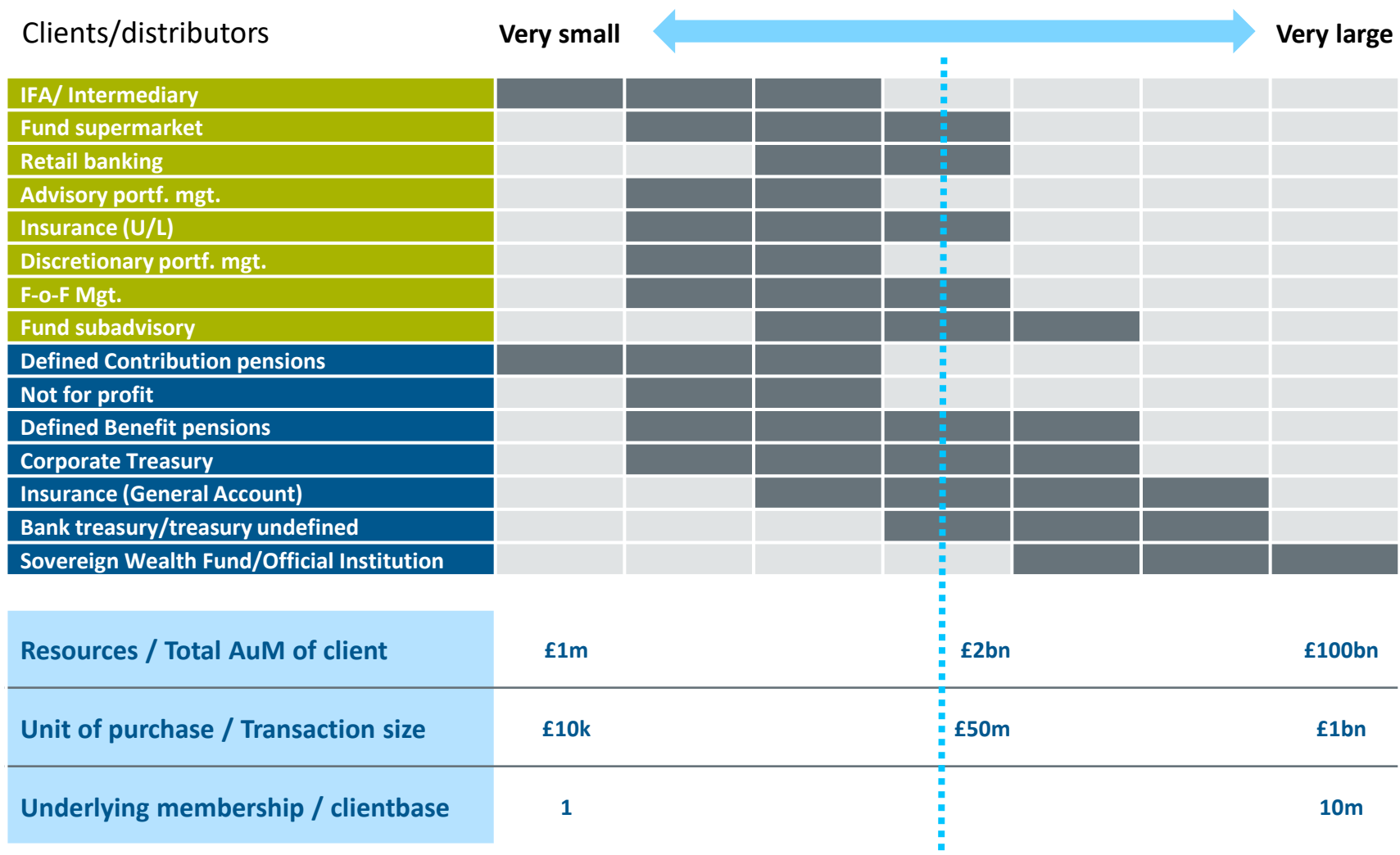
Source: Broadridge MI

Scale - and behaviour - varies widely within each type of Client/distributor



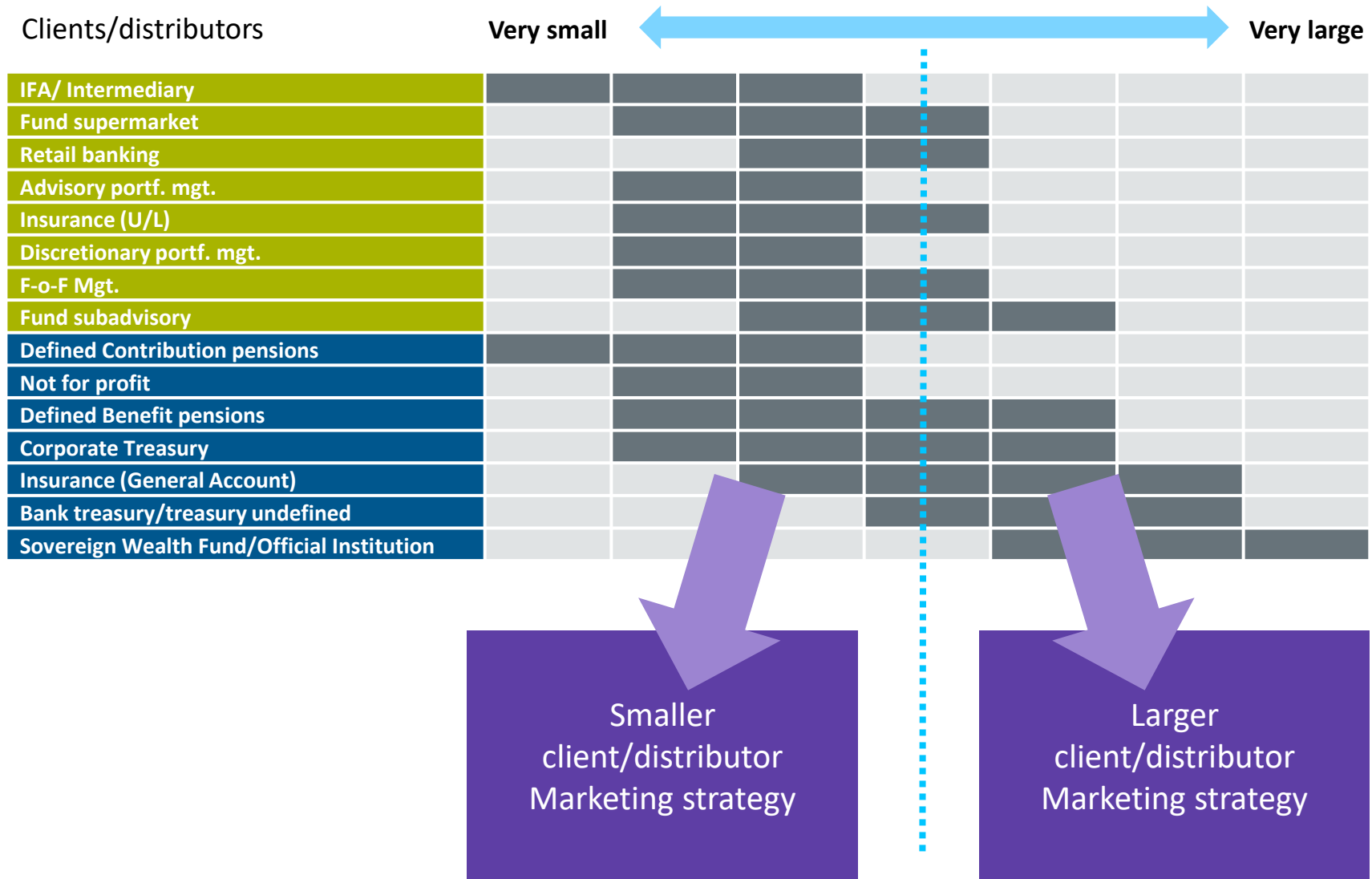
Source: Broadridge Analysis

Scale can be measured in various ways



Source: Broadridge Analysis

Time for a reconfiguration of marketing approach based on scale not type?






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Pulling the Right Levers

John Cooper, Editions Financial
Kirsty Maxey, Teamspirit
Jos Stokhuyzen, CSM
Richard Watts, Kurtosys

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EDITIONS
FINANCIAL

THE CASE FOR CONTENT

October 30th 2018

WWW.EDITIONSFINANCIAL.COM

WHO WE ARE



We are content specialists, uniquely dedicated to the Financial Services sector.



We are a global agency, with clients and offices in key markets around the world.

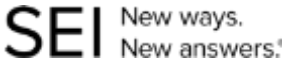


Our DNA is different. We're a driven team of specialist marketers, journalists, strategists and analysts.



WE DELIVER INSIGHT-RICH, PURPOSE-
LED CONTENT SOLUTIONS WHICH HELP
THE WORLD'S LEADING FINANCIAL
BRANDS CREATE MORE VALUABLE
RELATIONSHIPS WITH THEIR AUDIENCES

WHO WE WORK WITH



**IS THE INVESTMENT
IN CONTENT PAYING OFF FOR ASSET
MANAGEMENT FIRMS?**

**WHAT IS IT
THAT MAKES CONTENT EFFECTIVE?**

1.

“Quality content is sought after and shared.”

NO-ONE SEEKS OUT ADVERTISING AND SPONSORSHIP

CONTENT IS ACTIVELY SEARCHED FOR

ADVERTISING IS BLOCKED AS AN IRRITANT

BRANDED CONTENT EXISTS IN A ‘QUALITY ENVIRONMENT’

THE FUTURE OF ASSET MANAGEMENT

Meet the centennials

THE NEXT GENERATION OF THE INDUSTRY

BORN IN 1997.

35% OF THE GLOBAL POPULATION.

MOBILE NATIVES.

DIGITALLY DRIVEN.

PURPOSE DRIVEN.

EXPERIENCE DRIVEN.

KANTAR

CENTENNIALS AT 21 REPORT
OCTOBER 2018

THE FUTURE OF ASSET MANAGEMENT

Meet the centennials

THE NEXT GENERATION OF THE INDUSTRY

63%

SAY THEY'VE INSTALLED AN AD-BLOCKER ON
THEIR MOBILE PHONE OR DESKTOP "BECAUSE
ADS INTERRUPT ME WHEN
I WANT TO DO SOMETHING ELSE"

KANTAR

CENTENNIALS AT 21 REPORT
OCTOBER 2018

2.

“Content builds trust more effectively.”

ADVERTISING & SPONSORSHIP MESSAGES MAKE THE PROMISE CONTENT KEEPS

CONTENT DEMONSTRATES INSIGHT AND EXPERTISE

CONTENT PUTS AUDIENCE NEEDS FIRST – INFORMS AND ENGAGES

CONTENT DEMONSTRATES A POINT OF VIEW AND PURPOSE

THE FUTURE OF ASSET MANAGEMENT

Meet the centennials

THE NEXT GENERATION OF THE INDUSTRY

61%

SAY THEY HAVE PURPOSE-DRIVEN
EXPECTATIONS, LIKING BRANDS “THAT HAVE
A POINT OF VIEW AND THAT STAND FOR
SOMETHING”

KANTAR

CENTENNIALS AT 21 REPORT
OCTOBER 2018

3.

“Content builds brand distinction.”

HARD TO DIFFERENTIATE WITH PRODUCTS

HARD TO DIFFERENTIATE WITH ADVERTISING & SPONSORSHIP

EASIER (BUT NOT EASY) TO DIFFERENTIATE WITH CONTENT

EASIER (BUT NOT EASY) TO KEEP PACE WITH MARKET VOLATILITY

STATE OF PLAY

The biggest challenge to effective content marketing

2018 BENCHMARKING SURVEY

48%

STATE THAT PRODUCING CONTENT THAT
SUFFICIENTLY ENGAGES AND CUTS THROUGH
IS THE BIGGEST CHALLENGE TO EFFECTIVE
CONTENT MARKETING



4.

“Content can be precision targeted.”

RIGHT MESSAGES, RIGHT AUDIENCES, RIGHT FORMATS, RIGHT CHANNELS

HYPER-PERSONALISED AT SCALE – THEMES, CHALLENGES AND SOLUTIONS

ACROSS EQUITIES, FIXED INCOME, HEDGE FUNDS, LIQUIDITY AND CASH, ETFs

TARGETING DIFFERENT CLIENT SEGMENTS, MARKETS AND SECTORS

TARGETED AUDIENCES

WHAT CONTENT WORKS FOR AUDIENCES?

63%

more likely to engage with content specifically targeted to their needs.

67%

felt most branded content isn't enough to lead future-focused decisions.

64%

Prefer insights that take a bold, contrarian or provocative point of view.

THOUGHT LEADERSHIP
DISRUPTED – NEW RULES FOR
THE CONTENT AGE

The
Economist

SURVEY OF
1,500 EXECUTIVE
AUDIENCES

TARGETED AUDIENCES

WHAT HAPPENS WHEN THEY SEE COMPELLING CONTENT?

70%

will seek out more content from that same brand.

83%

are influenced in their choice of investment partner.

67%

would be willing to advocate for that brand.

THOUGHT LEADERSHIP
DISRUPTED – NEW RULES FOR
THE CONTENT AGE

The
Economist

SURVEY OF
1,500 EXECUTIVE
AUDIENCES

5.

“Content delivers better ROI.”

MORE MEASURABLE – BUILT FOR A NEW ERA OF PERFORMANCE MARKETING

MORE QUALIFIED LEADS = HIGHER CONVERSION RATES

MORE COST-EFFICIENT AND EFFECTIVE – LONGER BURN RESULTS

MORE FLEXIBLE ACROSS MULTIPLE TOUCHPOINTS

MULTI-FORMAT, OMNI CHANNEL

FORMATS

Ar ARTICLES	Pr PRESENTATIONS	An ANIMATED	Vi VIDEOFILM	Dv DATA VISUALISATIONS
Ig INFOGRAPHICS	Ev EVENTS	So SOCIAL	Ft FUNCTIONAL TOOLS	Sn SPEAKER NOTES
E EMAIL	Eb E-BOOKS	Cs CONVERSATION STARTERS	P PRINT COLLATERAL	Wi WEBINARS
Wp WHITE PAPER	Br BROCHURES	Sc SCRIPTS	Pc PODCASTS	Gd GRAPHIC DESIGN
Ar RM GUIDES	Wb WEBSITES	Pr PRESS RELEASE		

TYPES

Iv INTERVIEWS	Ht HOW TO	Rv REVIEWS	Q QUESTION BASED	TI THOUGHT LEADERSHIP
CS CASE STUDIES	St STATISTICS	Db DEBATES	Eb EVENT BASED	R RESEARCH
Tp TEMPLATES	Is INSPIRATION	Op OPINION PIECES	D DATA	An ANALYSIS
Pt PROTOTYPES	De DEMOS	Fr FRAMEWORKS	Tm TESTIMONIALS	Df DEFINITIONS
Sv SURVEYS	Tr TRENDS	Bp BEST PRACTICE		

A FINAL THOUGHT

“Content is more effective when it’s connected.”

CONTENT SHOULD BE INTEGRATED INTO BRAND MARKETING STRATEGY

NOT CREATED IN ISOLATION OF CAMPAIGN ACTIVITY

AN OVER-ARCHING PROPOSITION CREATES A CONNECTED JOURNEY


THE RIGHT PROPOSITION CAN WORK THROUGH THE LINE

THANK YOU

Kirsty Maxey

Teamspirit

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A 3D rendered transparent device, possibly a microchip or sensor, with glowing yellow internal paths and a blue cable. The device is shown in a side view, revealing its internal structure. The paths are complex, with several turns and junctions. A blue cable is connected to the bottom of the device. The background is a dark blue gradient.

It only works, if it all works



**People won't know about
you or your content unless
you distribute it**

To drive long-term growth and profit, you need both:



60%

Brand building



40%

Content marketing



**Advertising is a simple pay
to play medium It's a
guarantee of opportunity**

Sustained and consistent advertising works



Brand Worth
\$28Billion



Brand Worth
\$8Billion



Brand Worth
\$0.8Billion

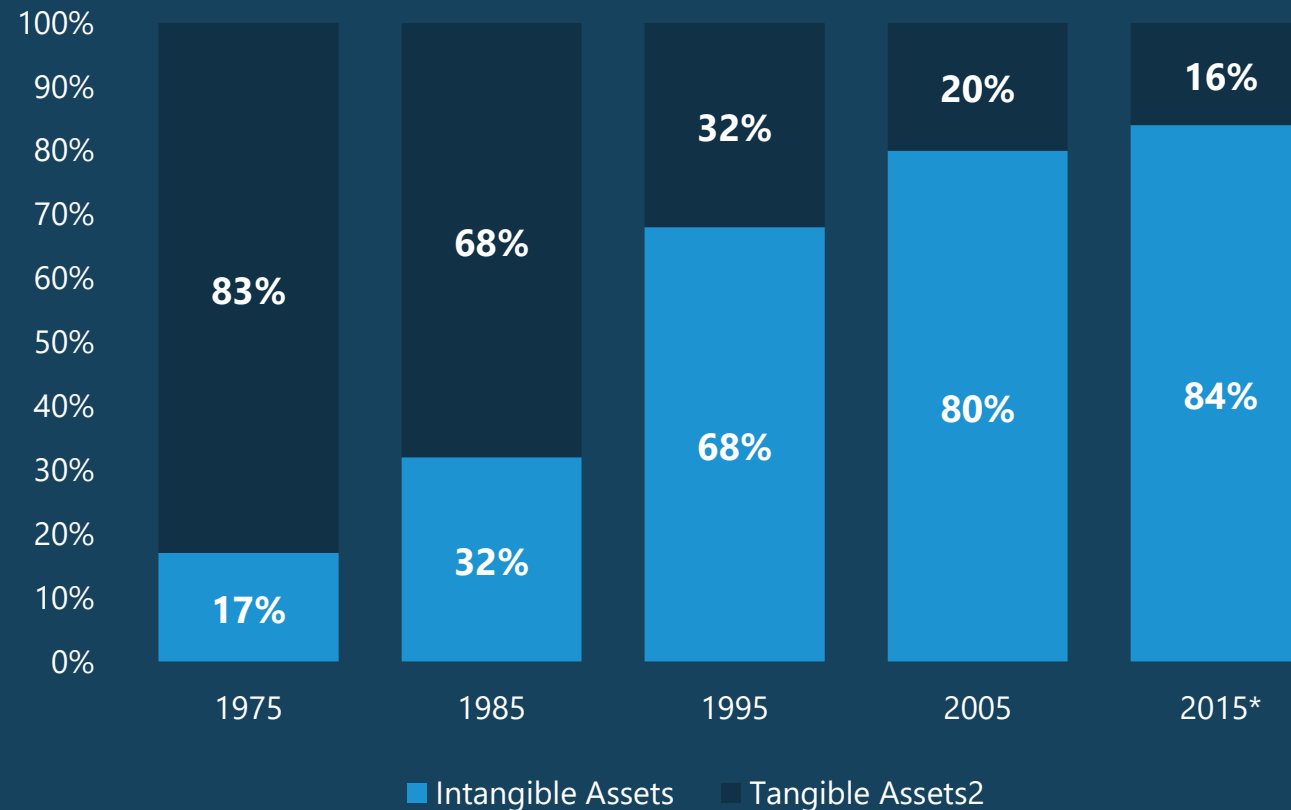
Delivering:

- Reputation
- Fame
- Brand value
- Market share
- Sales
- Price sensitivity
- Marketing effectiveness
- Relationship and emotional bond with customers

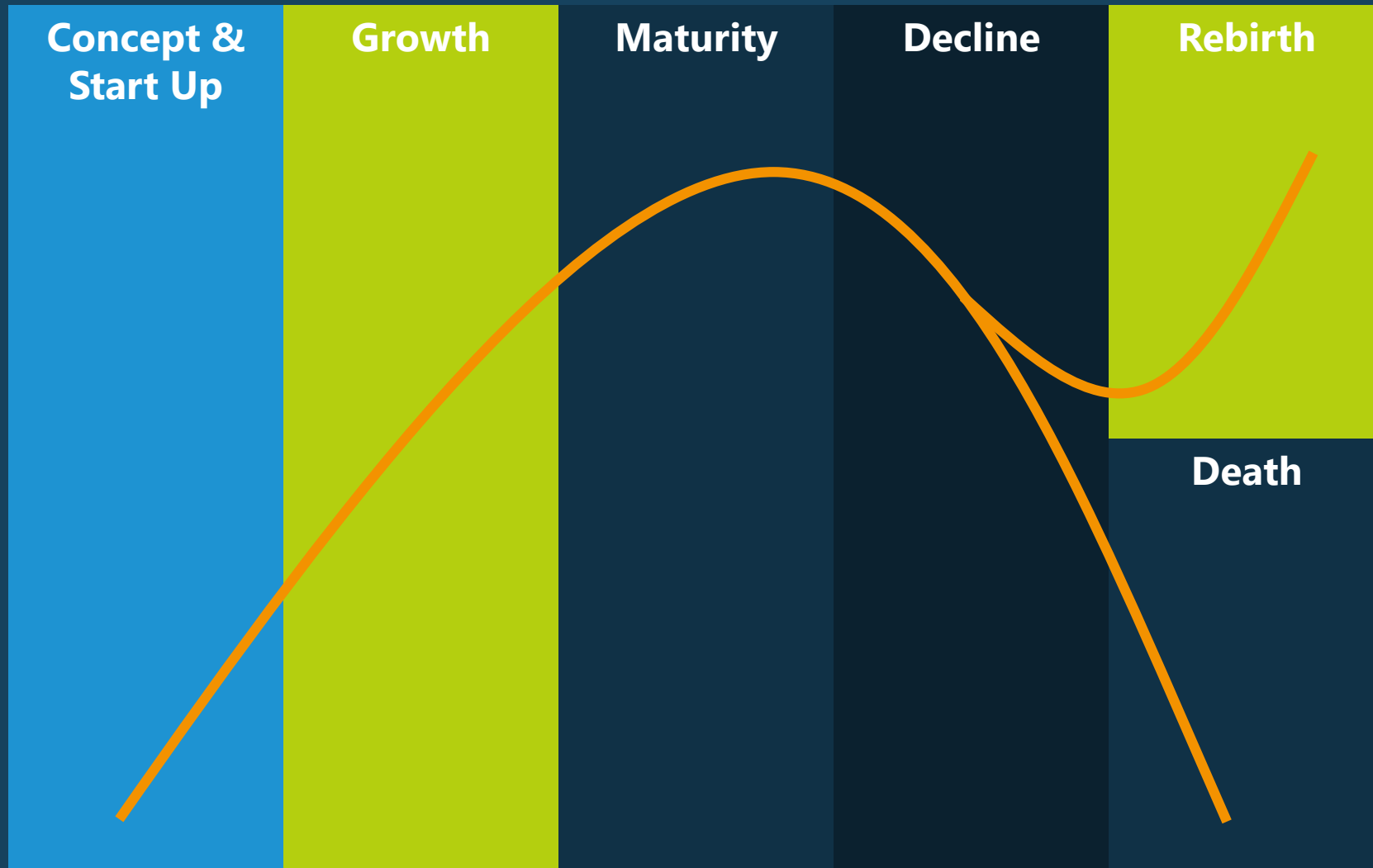


Over 80% Market Value is based on intangible assets

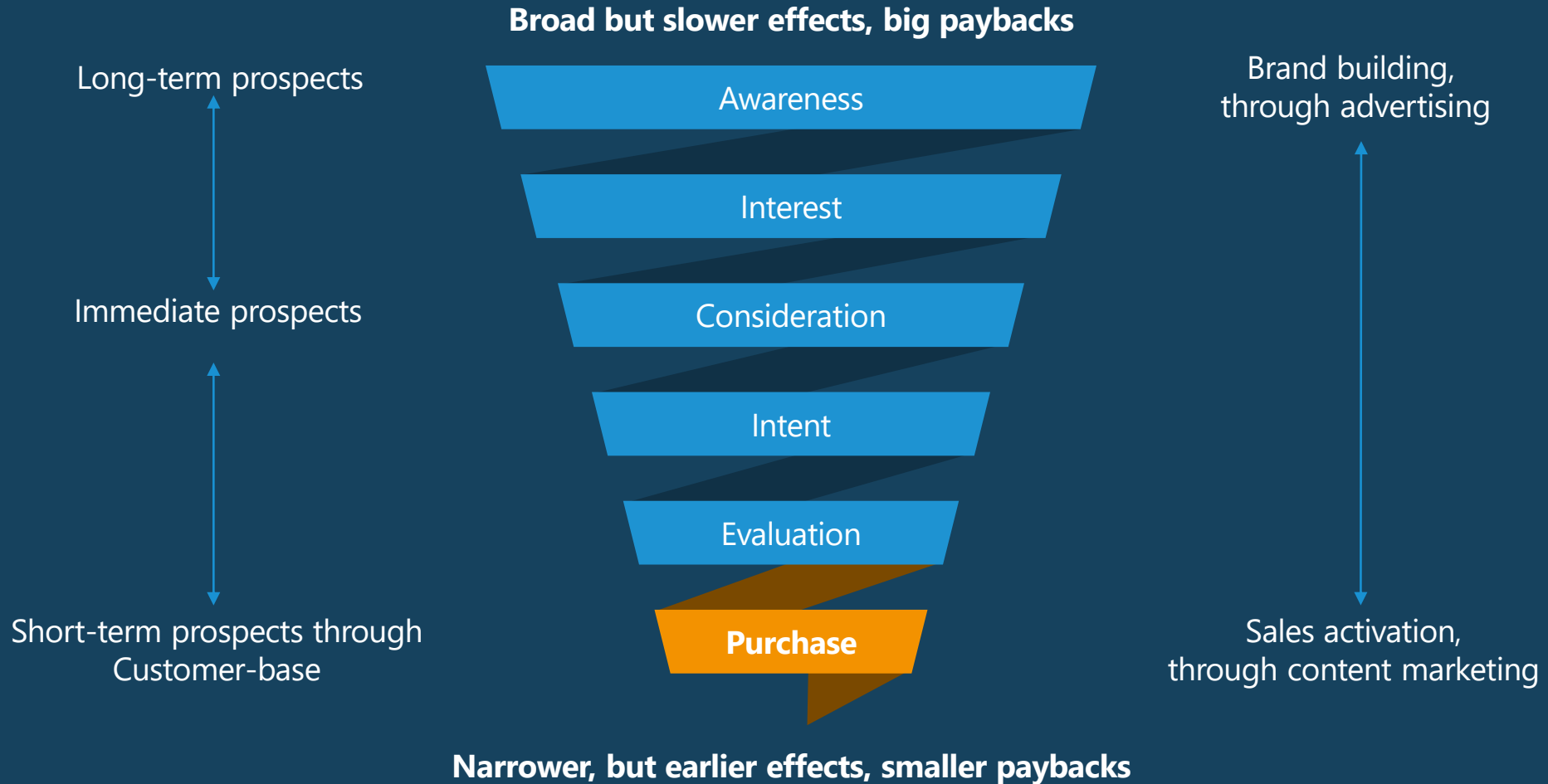
Components of S&P 500 Market Value



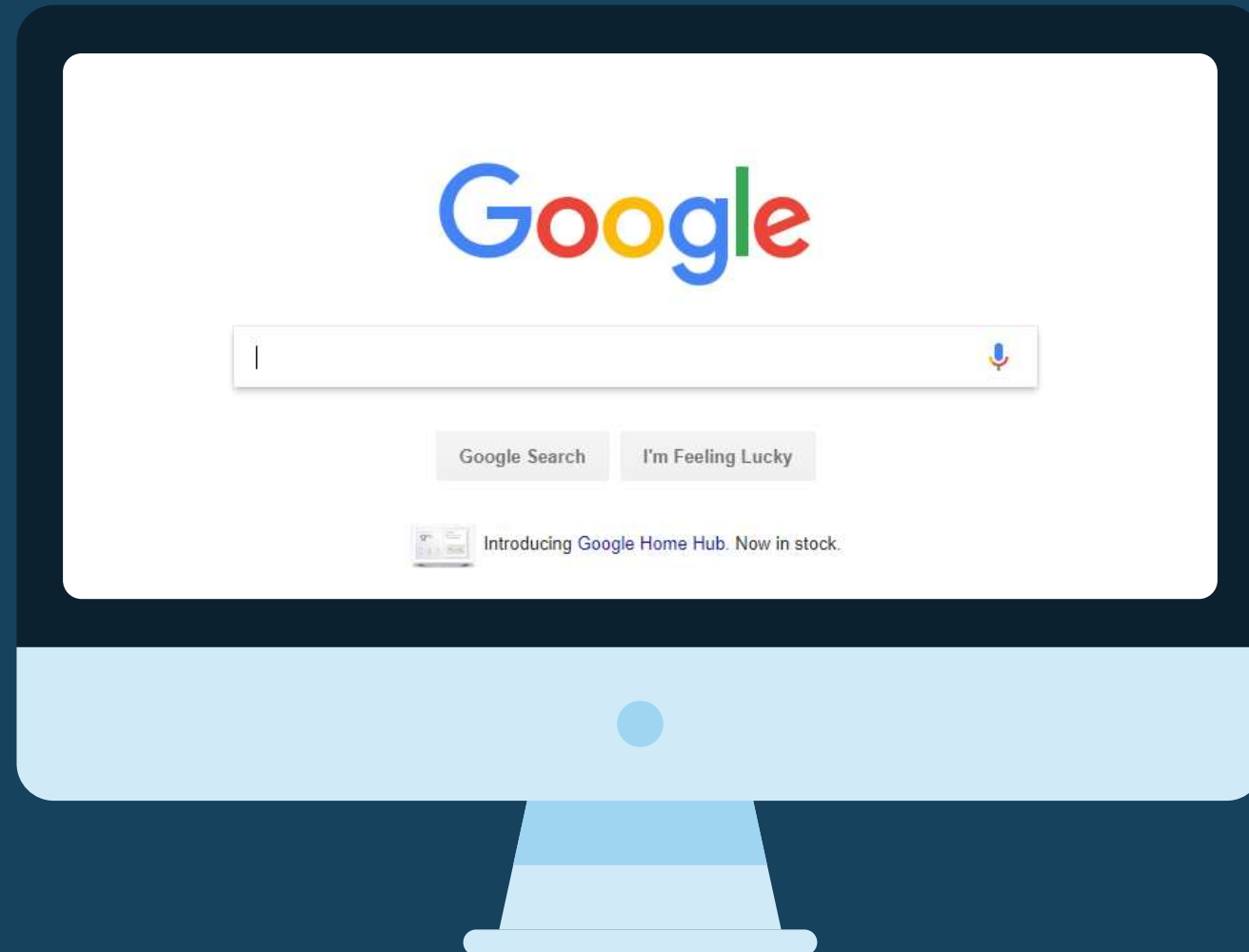
To stay in growth or rebirth you have to face the market



The new marketing funnel



Are your audience thinking of you when they google?



The exam question

Does investment in advertising spend pay off for asset management firms?



Yes, but it could pay-off even better in the long-term

Does advertising spend lead to more AUM?

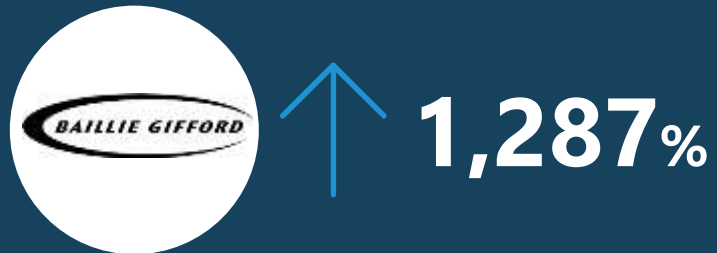
Top 10 spend on Advertising

1. Fidelity
2. Jupiter
3. Blackrock
4. Invesco
5. Aberdeen
6. M&G
7. Schroders
8. Baillie Gifford
9. Janus Henderson
10. Artemis

Top 10 Retail AUM

1. M&G
2. Blackrock
3. Invesco
4. Threadneedle
5. Fidelity
6. BNY Mellon
7. Jupiter
8. Janus Henderson
9. Schroders
10. L&GIM

Biggest growth over the last 5 years



Key principles for success

1. Balance short-term sales and long-term results
2. Balance approach to brand-building with 60:40 split
3. Upweight emotional approach
4. The reverse is true of sales activation
5. Best results achieved through integration - double efficiency
6. Share of voice matters more than ever
7. Measure both short and long-term effects

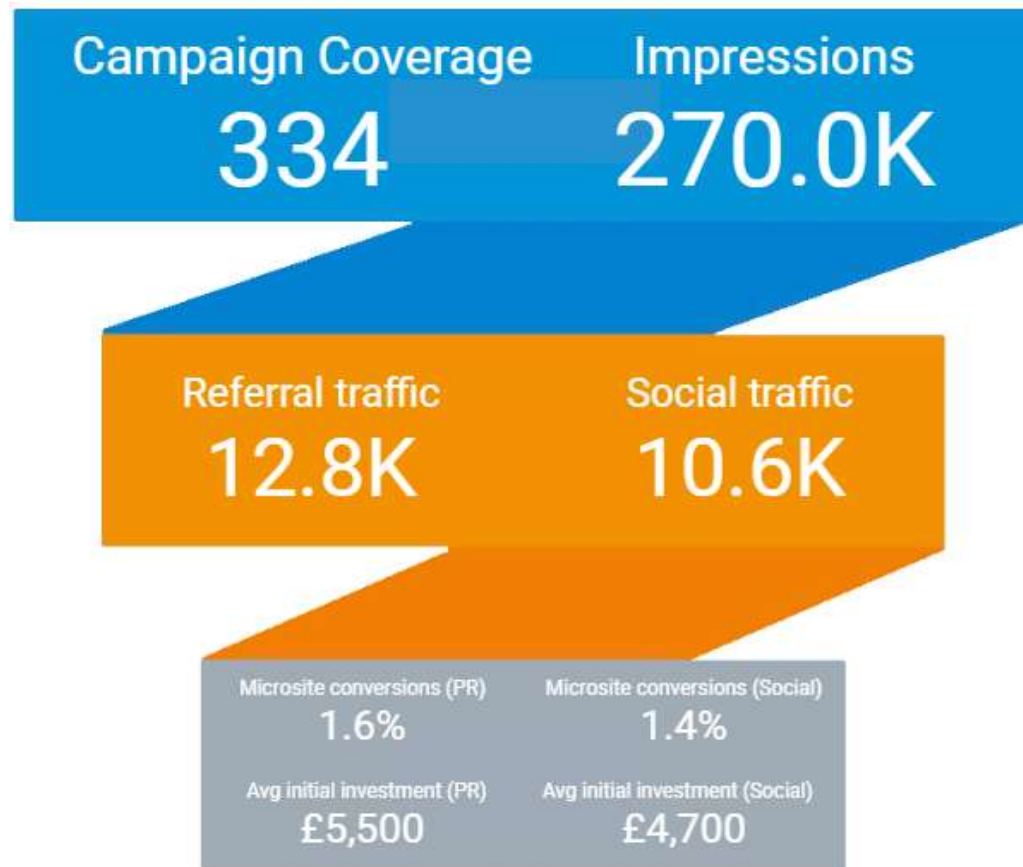




Marketing and PR Summary

1 Oct 2018 - 31 Oct 2018

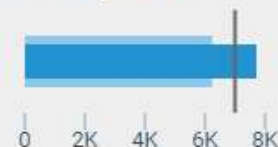
Campaign funnel



Applications Completed

1,782

↑ 54%



Intermediary Pages

Visits

56.1K

↑ 32%

Conversion rate

3.03%

↑ 40%

Media coverage

Coverage

407

↑ 5%

% of UK Nationals

29%

↓ -13%

Positive Coverage

84%

↓ -10%

Total Circulation

5.49M

↑ 13%

Display Ads

Spend

£150.4K

↑ 25%

CTR

1.8%

↑ 40%

Visits

56.1K

↑ 32%

Applications

1.8K

↑ 54%

Brand Awareness

Mentions

2,051

↑ 10%

Prompted

60%

↑ 7%

Unprompted

20%

↑ 11%


Thank you



Jos Stokhuyzen

CSM

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THE POWER OF SPONSORSHIP



INVICTUS
GAMES



MARKETING IN TODAY'S WORLD



CLUTTER

The majority of people would not care much if
73% of brands disappeared tomorrow



PERSONAL CONTENT PLANS

84% fast-forward/skip broadcast and digital
advertising



SHIFTING EXPECTATIONS

75% of us expect brands to make more of a
contribution to our wellbeing & quality of life
Only 40% believe brands are doing so



THE OPPORTUNITY

To reach people through their passion points in a way that
creates impact for your brand.

PARTNERSHIP NOT SPONSORSHIP



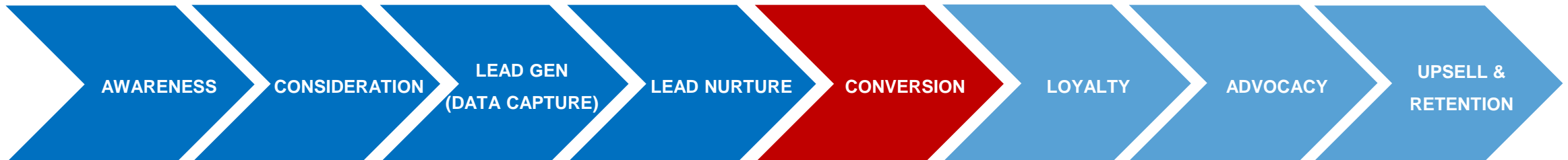
STORYTELLING DERIVED FROM YOUR OVERARCHING BRAND POSITION



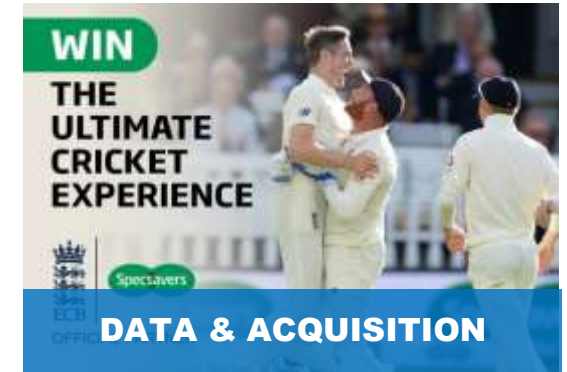
STRATEGY INFORMED BY THE CLIENT JOURNEY

PRE-PURCHASE

POST-PURCHASE



PARTNERSHIP TODAY



RELEVANT, VALUE-ADD CONTENT DELIVERED AT TIMELY MOMENTS TO INTERESTED PARTIES

NARRATIVE LED BUYING



DRIVE better
UNDERSTANDING
of how Aon
CREATES
VALUE

SHIFT MARKET UNDERSTANDING

THE RIGHT PLATFORM

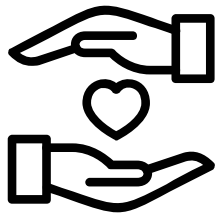
Our Partnership Narrative

- ▶ **Insight** is the difference between **winning** and **losing**:
 - ▶ between **hitting the mark** and failing at the final challenge.
 - ▶ Our insight, **driven by data** and **delivered by experts**, provides the edge our clients need to **get ahead** of the competition.

A CLEAR STORY

BUY WHAT YOU NEED

THE BENEFITS



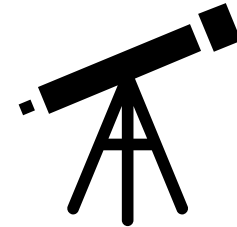
**EMOTIONALLY
CONNECT**



BUILD TRUST



**DRIVE COST
EFFICIENCIES**



FUTURE PROOF




CSM

THANK YOU

Richard Watts

Kurtosys

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THE FUTURE OF ASSET MANAGEMENT

“Pulling the right levers”

KURTOSYS
your investors matter



RICH WATTS

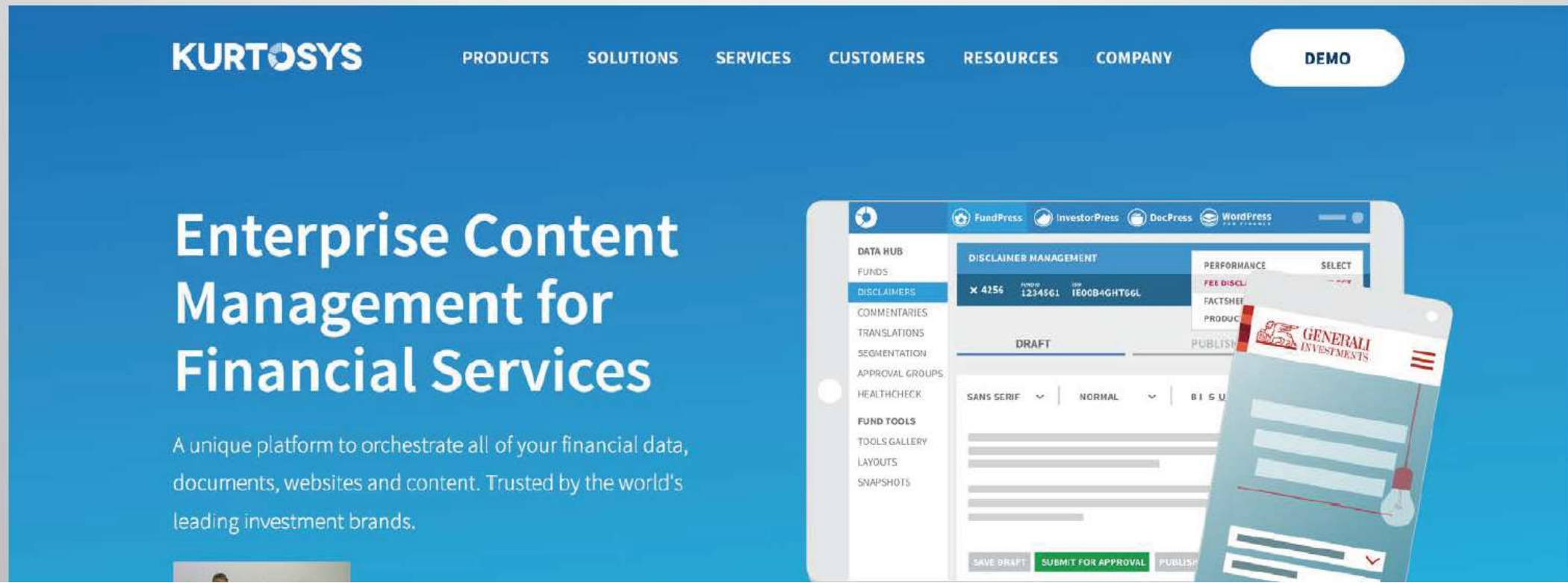


Global Head of Digital, Kurtosys

Rich Watts oversees global digital strategy, design & UX, WordPress platform delivery & product development at Kurtosys. With over 20 years proven experience in digital strategy and delivery, largely focused within financial service sector and specifically within asset & wealth management, insurance and crowdfunding.

Kurtosys provides a unique Enterprise Content Management platform for financial services firms. We enable marketing, sales and operational departments to orchestrate all of their data, documents, websites and content in a secure and compliant environment.

Visit kurtosys.com for all the info



KURTOSYS PRODUCTS SOLUTIONS SERVICES CUSTOMERS RESOURCES COMPANY DEMO

Enterprise Content Management for Financial Services

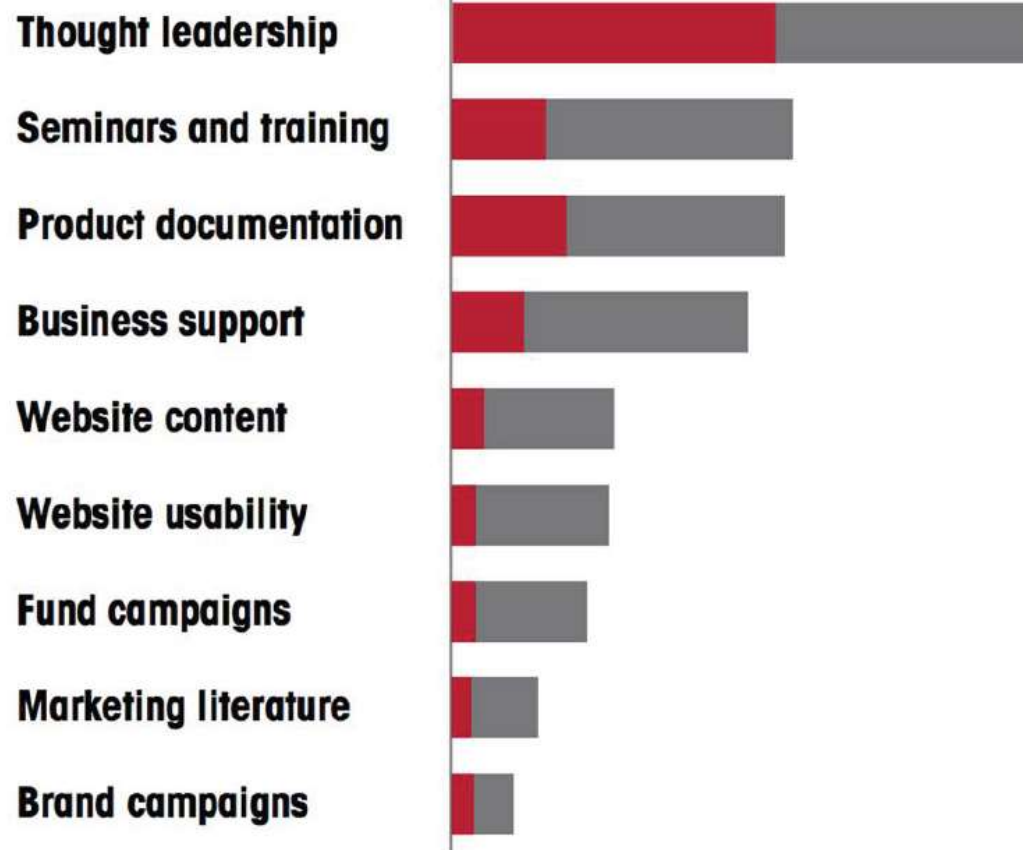
A unique platform to orchestrate all of your financial data, documents, websites and content. Trusted by the world's leading investment brands.

The image shows a screenshot of the Kurtosys website interface. The top navigation bar includes the Kurtosys logo and menu items: PRODUCTS, SOLUTIONS, SERVICES, CUSTOMERS, RESOURCES, COMPANY, and a DEMO button. The main content area features a large heading 'Enterprise Content Management for Financial Services' and a sub-headline 'A unique platform to orchestrate all of your financial data, documents, websites and content. Trusted by the world's leading investment brands.' To the right, there is a visual representation of the platform's capabilities, showing a tablet displaying a 'DISCLAIMER MANAGEMENT' interface with a 'DRAFT' status and a 'GENERAL INVESTMENTS' logo, and a smartphone displaying a document layout.

Why thought leadership matters

In a survey involving over 1,600 interviews, *NMG Consulting* discovered that asset managers in institutional markets consider thought leadership to be the most valuable activity for promoting understanding and improving perceptions among clients.

■ 1st Ranked ■ Other



Coupled with the importance of content marketing...

The 2018 Kurtosys Digital Marketing survey discovered that a combined 82% from 200 marketers place great emphasis on content marketing as a strategy.

Extremely important

40%

Very important

42%

Somewhat important

17%

Not so important

1%

**However,
quantity
over quality
is not going
unnoticed...**



Content marketing “works” in financial services as a digital strategy



Too much content is being produced by firms so it's quantity rather than quality



Content in financial services needs to be more targeted to fit audiences



0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Strongly Agree Agree No opinion Disagree Strongly Disagree

The best thought leadership – what we know

Asset managers should:

- Promote their views, not their products
- Be timely and topical
- Work within their niche and dominate that space
- Be original and individual
- Use social to amplify their influencers

Swapping sponsorship

Pictet moved their sponsorship budget over to a content hub with 4 dedicated authors. The content is connected to their investments via a 'find out more' call to action in each article, but is otherwise an unbranded exercise in thought leadership.

Mega works with scientists, academics and thought-leaders to create authoritative, compelling and trustworthy content.



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by MEGA
Oct, 2018

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Mario Eiseneqger today

Tobacco and drinks companies used to be considered very stable, almost quiet industries. Industry players sold products that had no substitutes, and investors would not have to be too worried about negative earnings surprises. That picture seems to have changed now, with new products gaining popularity in the tobacco world and the recent legalisation of cannabis in Canada shaking things up in t...

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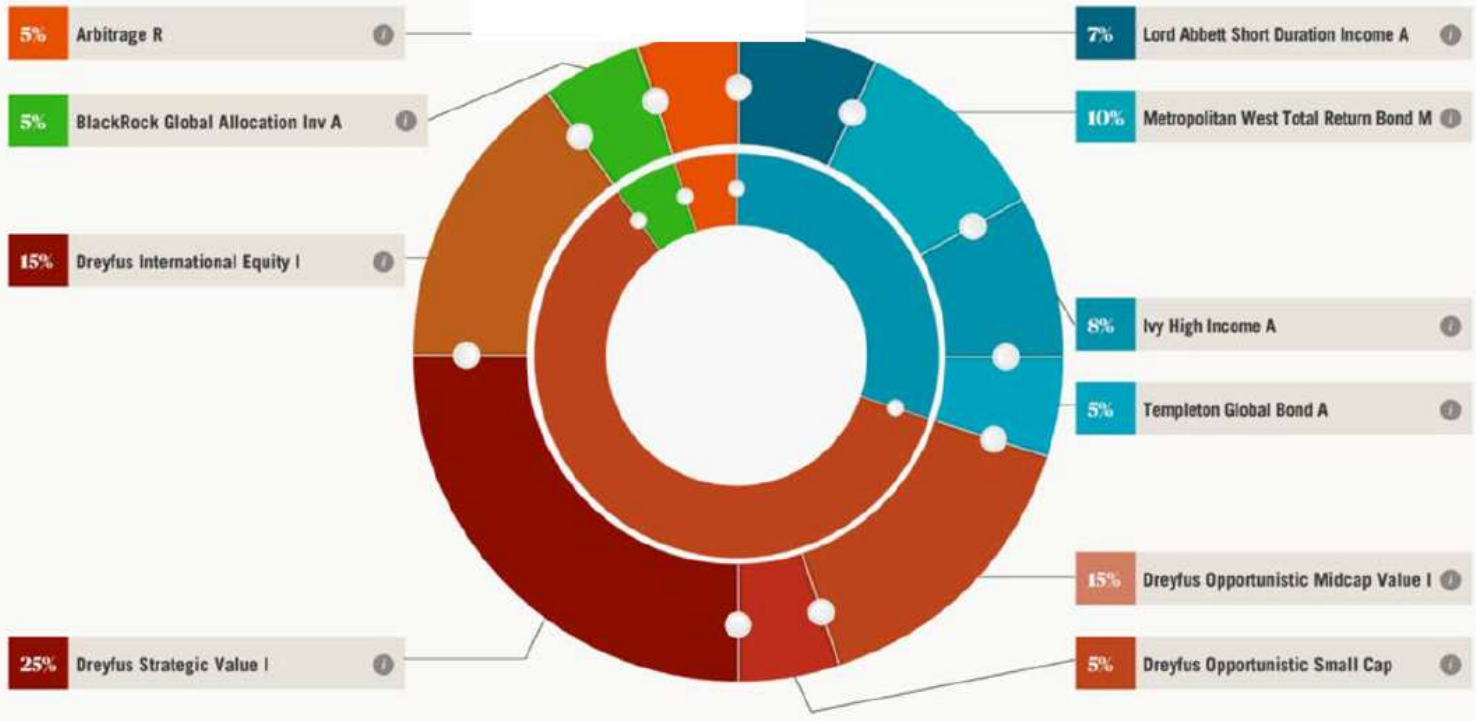
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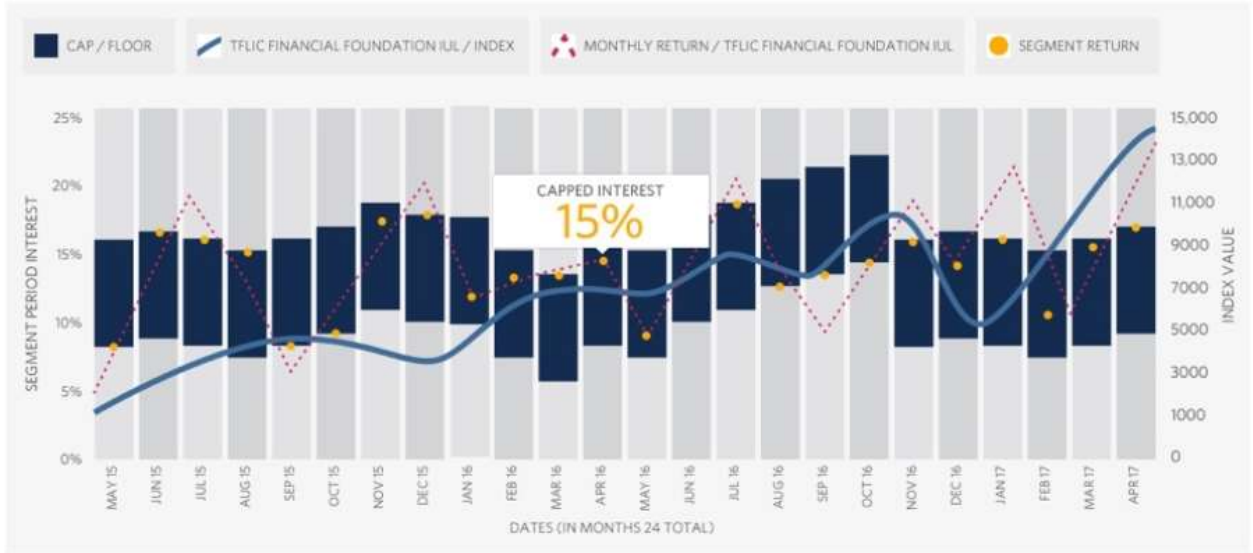
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Visualise Risk

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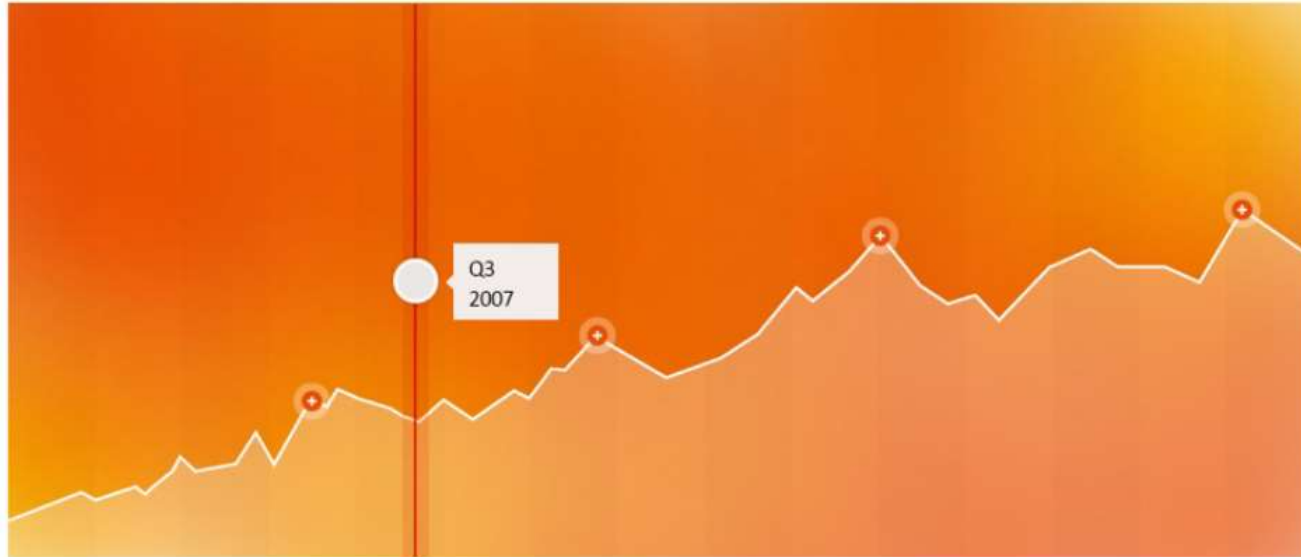
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CAP	700	FLOOR	1200	CAPPED INTEREST	15%	ACTUAL INDEX RETURN	26.8
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Risk & Return from Inception



Growth of €10,000 from Inception



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WINNING IN THE BOARDROOM

September 2018

ADD TO THE BOTTOM LINE

HOW DO WE ENGAGE **C-LEVEL**

- SPEAK THEIR LANGUAGE
- KNOW WHAT KEEPS THEM AWAKE AT NIGHT
- COMMIT TO CONTRIBUTING TO THEIR GOALS

SPEAKING THE LANGUAGE OF THE BOARD

Think P&L



Understand their challenges



Activate strategic solutions



Measure, report & learn



NOT



THINK P&L



KEY DRIVERS MARKETING EFFECTIVENESS:

- Strategise, position and plan based on facts
- Tell a compelling and consistent story
- Deliver on brand promise and customer experience
- Act, deliver and measure
- Lead and develop self, people and organisation



DRIVERS MARKETING EFFECTIVENESS

UNDERSTAND THEIR CHALLENGES

Longevity

Across the globe people are living longer

Correlation

The financial crisis showed us that asset classes are increasingly correlating.

Power rebalance

Technological developments will give back power to the people.

Risk management

Calculations of risk, performance attribution and risk premia have improved.



Artificial intelligence

AI will replace the work that can be modelled with decision trees and algorithms.

Transparency

Information is just a few clicks away. Risk adjusted return and TERs.

Critical citizen

Investors will lose trust in institutions, politicians and corporates.

Preservation

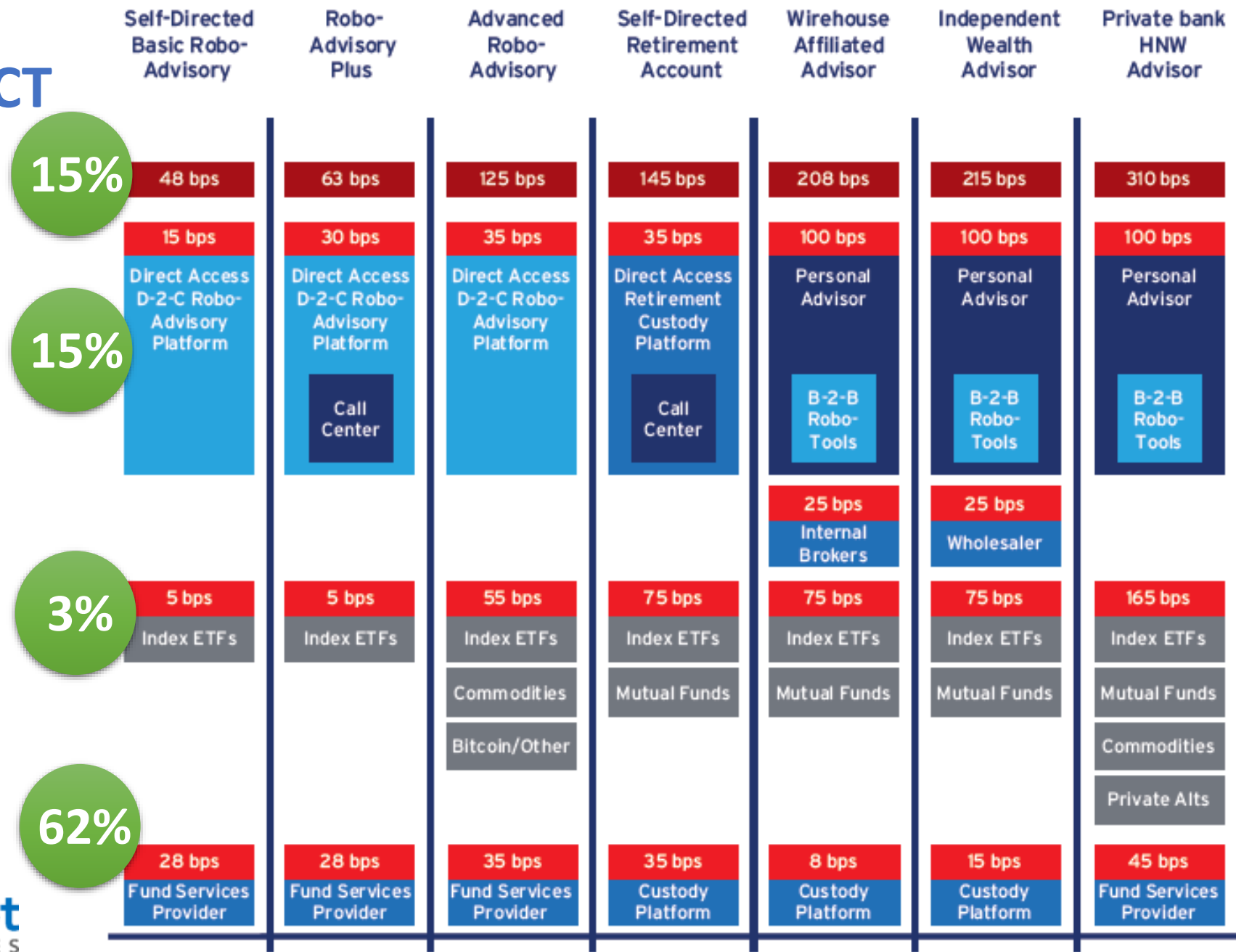
Governments, NGOs and investors will push for achieving the SDGs.

Fees

Fee levels will continue to decrease for lackluster performance.

Chart 5.12: Costs Associated with Wealth Client Access Models (Illustrative)

AND IMPACT



Source: Citi Business Advisory Services

MARKETING PROGRAMS WITH **STRATEGIC IMPACT**



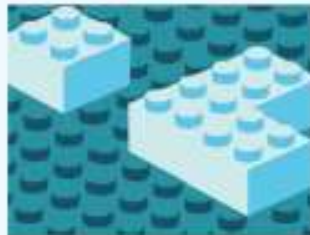
UTILISE TECHNOLOGY (CAMPAIGNING EXAMPLE)

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New to the sector investing? Our comprehensive guide contains foundational information and ideas to help you get started.

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TEMPLATE →

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For professional investors only. Capital Risk Investing involves risk including the risk of loss of capital.

UNIT ON DISPLAY



UTILISE TECHNOLOGY (AI EXAMPLE)

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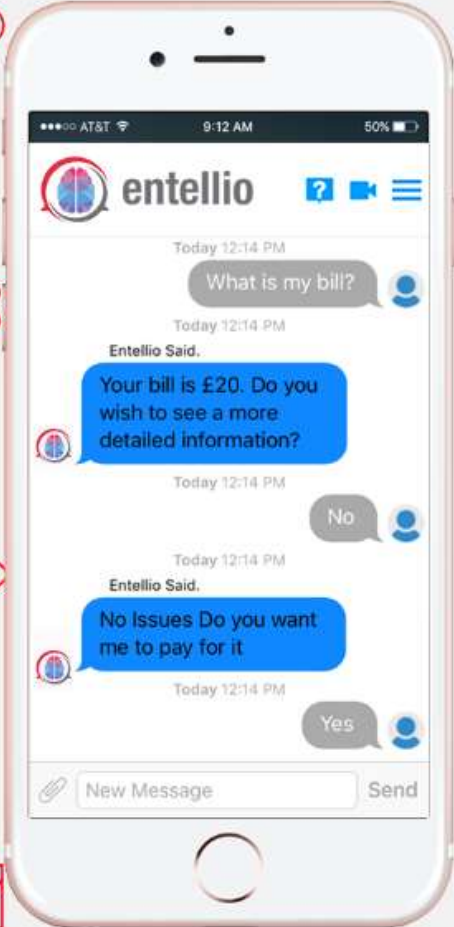
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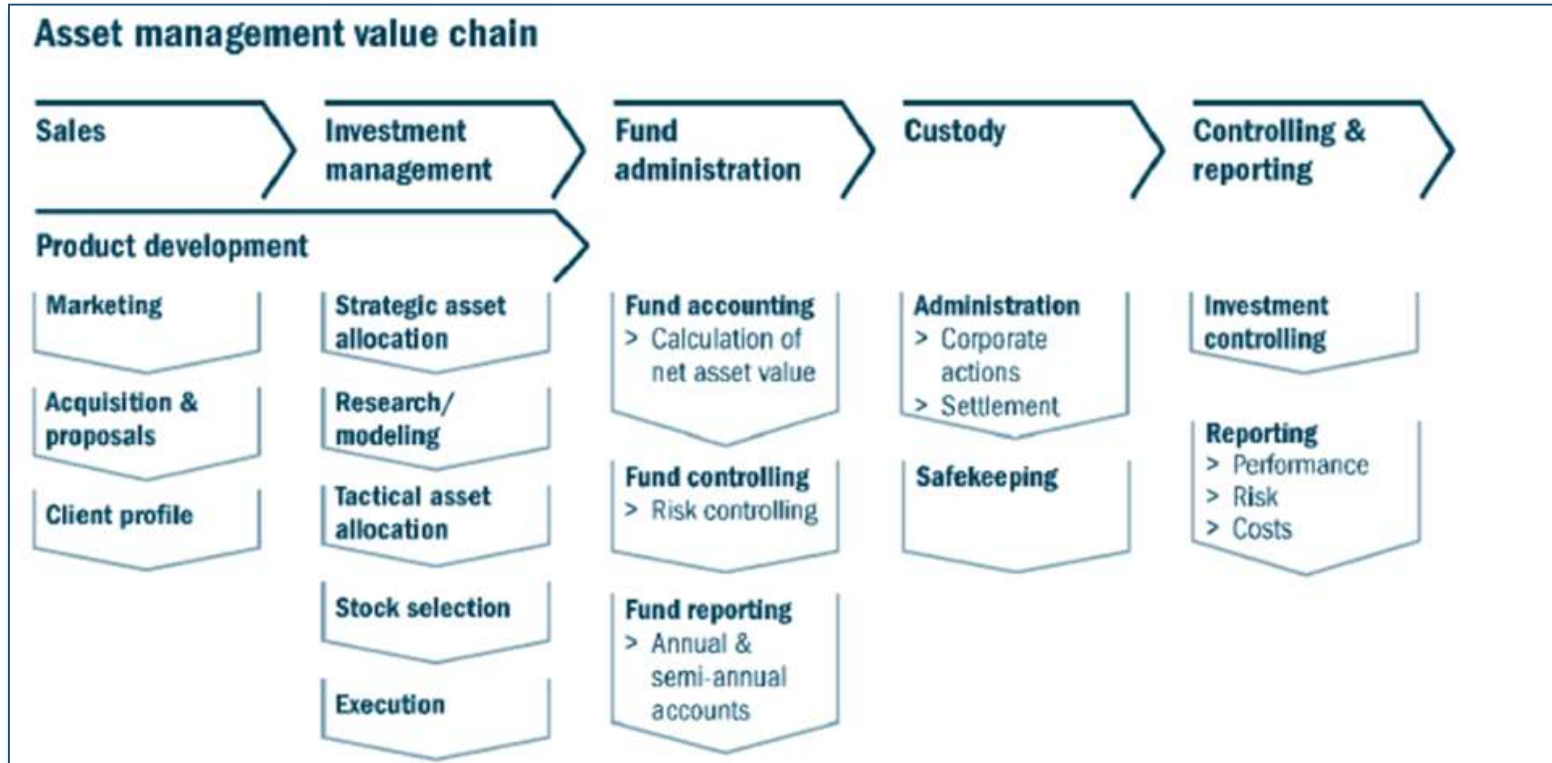


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T-SHAPED PROFESSIONALS **WILL THRIVE**



WHAT DOES THIS MEAN FOR SALES, MARKETING & DISTRIBUTION?

Think P&L



Stay abreast of their challenges



Activate strategic solutions



Measure, report & learn



WHAT DOES THIS MEAN FOR SALES, MARKETING & DISTRIBUTION?



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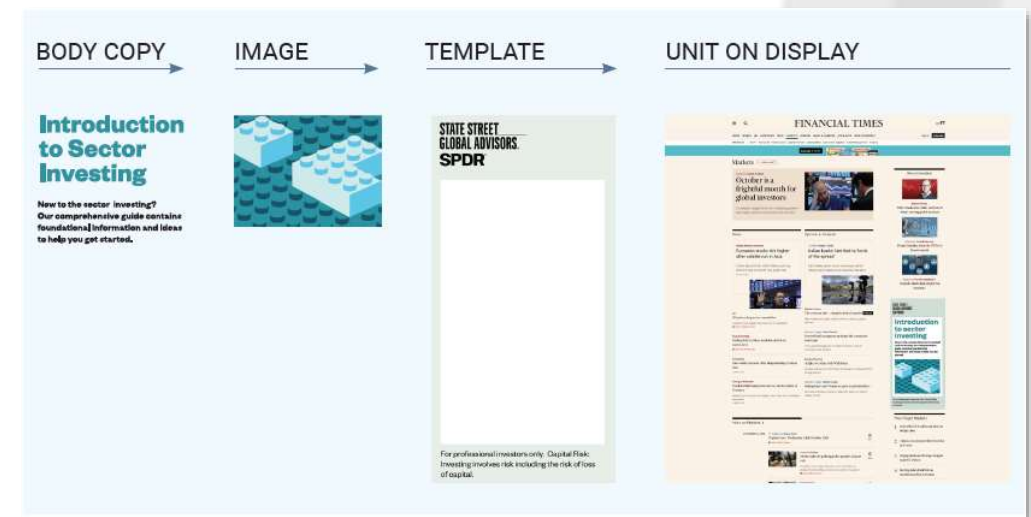
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ABOUT US



Vincent Hooplot - Managing Director

With more than 20 years of senior management experience in the global financial services industry Vincent Hooplot has held positions like Senior Vice President, Group Director and Managing Director and has been part of Executive Boards & Committees, Product Quality Boards and Branding Boards. He knows the challenges that senior leadership teams, managers and professionals in asset and wealth management face. Vincent has held global responsibility on the intersection of commerce, IT and finance (E.g. Marketing, Account Management, Sales, Sales Enablement, E-Business, Functional Application Management, Information Management and Content Management). He has worked for ING, Robeco, NN IP, Rabobank, OXFAM, OpenProvider, Mn Services.



Michiel Breeschoten - Managing Partner

Michiel made his mark in large and mid-sized corporates holding both sales and marketing positions. With over 23 years of Marketing and management experience in Finance and other industries, both in B2B and B2C. Michiel knows and acknowledges the importance of understanding the drivers of commercial performance. Experienced in both managing people and processes, from improving team performance to designing, negotiating and implementing Global Content Management Organisations. He has worked for PON Leasing, ABN AMRO Bank, ABN AMRO Asset Management, Fortis Investments, Robeco, Kempen, Friesland Campina/DFE Pharma and NN Investment Partners.

ABOUT US



Dorit Erzmoneit- Senior Consultant

Dorit has an entrepreneurial and corporate background working in blue chip asset management, founding and running her own start-up, and working as COO in a boutique art education firm. She has worked in investment management for over 15 years, among others for Fidelity Investments, M&G, Banque Generale de Luxembourg (Fortis Group) having started out in multi-level funds distribution at Tecis in Germany. In addition to her native Germany, Dorit has lived and worked in the US, Luxembourg, London, Zurich, Singapore and The Netherlands. Dorit has an MBA from the University of Chicago Booth School of Business. With her diverse background, cross-cultural awareness and flexibility to adapt to and embrace change and technology, she understands the challenges investment management firms are currently facing and is well equipped to help them find differentiated and competitive solutions.



Iina Ikonen - Marketing Consultant

Having a strong academic background, Iina holds a Master of Science degree from the Stockholm School of Economics, where she studied Marketing and Media Management. She has previously worked in brand and media agencies such as Cartils in the Netherlands and Whispr Group in Sweden, where she has gathered experience in both qualitative and quantitative research from a variety of industries. She has worked with creating strategies for new market entrances, products launches as well as rebranding projects.




Frank van den Berk- Senior Consultant

Frank has a background in mostly marketing and IT in financial services and as an entrepreneur on digital transformation. Frank has worked for ABN AMRO Asset management, Fortis Investment and BNP Paribas Investment Partners for almost 24 years. With a MBA and computer science as background, Frank has held roles as head of eCommerce, head of eBusiness and head of digital transformation. Frank also worked as an interim manager or consultant in automotive, telecom, FMCG and other sectors as transformation consultant, business partner or head of digital marketing. All-in all change is a guiding theme in his career. Frank is mostly focusing on innovation of processes and services. This is possible because of new technologies, the data and insights and the development of new skills of people.

The Future of Asset Management

01 November 2018

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