

Madison Advice Technology Expo

Tuesday, 12th September 2023



Time	Agenda item	Speaker
9:20 - 9:30am	Kickoff & Welcome	
9:30 - 10:45am	Generative AI: A turning point for AI in financial services. This presentation will cover: <ul style="list-style-type: none">the landscape for Artificial Intelligence systems, and the genesis of Generative AI in financial services.The unique attributes of language models that make them enormously transformative for finance, as well as their weaknesses and risks.A use case that demonstrates the application of Generative AI into financial servicesAn analysis of the ethical and responsible guidelines for AI systems.	Dr. Michael Kollo CEO, Evolved Reasoning
10:45 - 11:00am	Break	
11:00 - 12:00pm	Advicetech “Humans with Machine” In this presentation/white paper we explore how machines can supercharge human productivity and the client experience, with a close look at current and emerging technologies. We will do a deep-dive in how you can introduce artificial intelligence into your practice, with a discussion on the practical applications that are available right now, spanning everything from marketing, customer management and compliance. We will investigate the role that data plays in maximising business effectiveness and also how client portals are the machine to provide an always-on advice experience.	Andrew Braun General Manager Marketing, Netwealth
12:00 - 12:30pm	3 Lines Compliance Portal Madison will be launching their customised 3 Lines compliance portal over the coming months to manage advice audits, pre-vet file reviews, compliance action items and range of other compliance tasks The demo will give an overview of the adviser functionality and how to get the most out of this new resource.	Julia Vojkovic Director, 3 Lines Consulting
12:30 - 1:00pm	Lunch	
1:00 - 2:00pm	IRESS and The Future of XPLAN Kerry will explore how automation in advice practices is driving improved performance and profitability and explore the IRESS strategy looking into the future. Matthew will introduce us to IRESS Labs and how they are engaging with end users as part of their research and development to drive the next wave of automation and efficiency.	Kerry Ong Team Leader for Enterprise, IRESS Matthew Townsend Product Manager – IRESS Labs
2:00pm	Close	