

2018'S UNCONVENTIONAL CONFERENCES: TECH AND FINTECH, FINANCE, BANKING AND INSURANCE

There are multitudes of conferences, summits and events each year for every and any type of business. Since there are so many innovative and high quality conferences, it can be difficult to decide which ones you or your company should attend.

Conferences don't only promote collaboration and sales opportunities, but are an incredible resource for networking with like-minded people and businesses. They also provide the opportunity to learn the latest ideas and innovations in your industry and stand out from the crowd based on your marketing or leadership ideas.

It can be difficult to decide which conferences are going to provide the most benefit to you and your business. Sure, you may be attending a conference to collect business cards and leads, or further your personal and career development, but the key question to ask yourself before you register and pay for any conference, is "What will I or my clients get out of this?"

To help address this question, we've looked at top UNconventional conferences for professionals in the wealth management and financial sector where they can benefit - and stand out.

Below are a list of unconventional 2018 conferences broken down by Tech/Fintech, Finance, Banking, and Insurance:

Tech/Fintech:

[Social Innovation Summit 2018](#)

Location: San Francisco Bay, CA

Dates: June 5th-6th, 2018

Focus: Business Innovation and Social Transformation

Why it's on our list: This conference is geared toward young innovators and entrepreneurs, with an emphasis on social action. This is not only great for networking, but a catalyst for you and your team to use the social action aspect for some PR. More consumers, clients and businesses are gravitating to companies that are socially responsible, so why not add this function to your business?

Blurb: "Let's be clear about one thing, we are not your average conference. Those who are playing at the nexus of technology, investment, philanthropy, international development, and business come together to investigate solutions and catalyze inspired partnerships that are disrupting history. If we are obsessed with anything, it is great people. We convene the world's most potent leaders, thinkers, and practitioners with an unwavering bias towards action and a push towards scale."

[Enterprise UX](#)

Where: San Francisco, CA

When: June 13th-15th, 2018

Focus: User Experience conference based on useful and humane experiences for people who work in or for enterprise companies.

Why it's on our list: Your clients are the users. This conference is great for enterprise software providers who care to give their clients the best UX experiences. You'll bring back knowledge in UX design and learn from the best innovators.

Blurb: "Enterprises—huge, distributed, complex businesses, government agencies, and other large organizations—account for an enormous portion of the global economy. Yet people who engage with enterprises—employees, customers, and managers—face experiences that are tedious, fragmented, complicated, and just plain awful, especially when compared with consumer-facing experiences. It's time to right these wrongs—and that's why we created the Enterprise UX conference series."

[Identiverse](#)

Where: Boston, MA

When: June 24th-27th, 2018

Focus: World's largest identity industry event.

Why it's on our list: No matter what industry you work in, your clients deserve to have their identities, personal information and financial assets protected. Identity security is a main selling point with any software.

Blurb: "People, applications and devices are gravitating toward a digital world where they all recognize and interact with each other. This digital world is being built on a foundation of identity security designed by a community of people with a shared vision, from technologists and practitioners to thought leaders and end users. This is the identiverse."

[CXFS](#)

Where: Boston, MA

When: July 10th-12th

Focus: Senior level customer experience executives discuss the latest in Customer Experience design, innovation, culture and strategy.

Why it's on our list: Learn specifically about about customer experience with a focus on compliance in the financial services industry.

Blurb: "More case studies delivered by senior level customer experience executives to provide a rare chance to benchmark both within and outside your industry and walk away with new best practices. Case studies are just 20 minutes to make sure they focus on key takeaways. An invite-only VP think tank that allows for senior level customer experience executives to brainstorm innovative new concepts in a closed-door environment."

[VM World](#)

Where: Las Vegas, Nevada

When: August 26th-30th, 2018

Focus: For software designed business and expert industry perspective on what matters most in IT.

Why it's on our list: This conference hosts a number of deep-dive discussions and customer focused bootcamps on a variety of topics. If you don't understand the latest in IT and the future of IT, your clients may go to a company that does. Get with 2018 at this conference!

Blurb: "VMworld is VMware's premier digital infrastructure event. Join us for five days of innovation and learn new skills, hear expert insights, and gain the tools to enable business success. At VMworld, you'll join the industry's top thought leaders, subject matter experts, and IT professionals to immerse yourself in the latest in cloud infrastructure and business mobility technology. This is the one indispensable event to discover the technology, trends, and people who are shaping the future of digital business."

[Industry: The Product Conference](#)

Where: Cleveland Ohio

When: October 1st-3rd, 2018

Focus: Learn about building, launching and scaling new world class software products.

Why it's on our list: Learn how software works, and acquire new skills to pass on as a trusted advisor and educator to your clients.

Blurb: "The Product Conference, you'll explore with other Product Management professionals, startup founders and renowned product leaders the new methods, frameworks and tools being used to build, launch and scale groundbreaking software products."

Finance:

[INSITE'18](#)

Where: Orlando, Florida

When: June 6th-8th, 2018

Focus: Financial Industry Event for Success Minded Advisors. Come meet us there!

Why it's on our list: You'll be able to learn how to predict and explain change to your clients, and prepare your clients for emerging technology. Meet like minded individuals throughout the pipeline of the financial services market. Check out our insight from this conference [here](#).

Blurb: "INSITE is the premier industry event for success-minded financial professionals interested in enhancing client relationships and growing their business. INSITE features an impressive lineup of world leaders and industry experts, showcases our latest offerings, provides access to an exhibit hall featuring strategic providers and helps

financial professionals develop new business, increase efficiency and differentiate themselves in today's marketplace."

[Invest](#)

Where: New York, New York

When: July 10th-11th, 2018

Focus: A leading wealth-tech event for the entire wealth management community.

Why it's on our list: Chances are your new and existing clients are going to be asking questions about wealth-tech and this conference will make you more informed to build the trust you need.

Blurb: "Wealth management is changing dramatically as the industry's traditional leaders and new players bring enhanced offerings—both front end and behind the scenes, to retail customers and advisers. These new platforms offer better user experience, more investment options, transparency and reduced fees. In|Vest brings together technology and strategy executives from across the entire wealth management community to explore the changes in the market and offer a digital vision of the future."

[XYPN Live 2018](#)

Where: St. Louis, Missouri

When: September 23th-26th, 2018

Focus: A technology based conference for advisors.

Why it's on our list: You'll be meeting the best like-minded advisors in the business, and you can sign up for customized one on one coaching with subject matter experts.

Blurb: "The XY Planning Network is the leading organization for fee-only financial advisors who want to serve their Gen X and Gen Y peers providing comprehensive financial planning services for a monthly subscription fee and without product sales or asset minimums. The Network offers a virtual community for new and established financial advisors who want to serve a younger clientele, and provides its members compliance support services, marketing support, business tools and templates, and a wide range of technology solutions."

[FPA NexGen Gathering](#)

Where: University of California, Santa Barbara

When: June 24th-26th

Focus: Geared toward the next generation of Financial Wealth Managers (ages 36 and under) with the theme "Grow Together", focused on professional growth and the history and future of the industry.

Why it's on our list: You will have the option to receive a minimum of 2 CFP CE credits, with the ability to complete all available CFP CE during or after the conference, which will inevitably benefit potential clients.

Blurb: "Join the best and brightest minds of the next generation of financial planners at the annual FPA NexGen

Gathering. This event provides an opportunity to discuss hot topics and trends facing the future of the financial planning profession and a chance to get to know your peers, colleagues and the FPA leadership in an intimate and free-flow setting. We welcome all members of the financial planning community to join the conversation and experience the pulse, passion and vision of the next generation of financial planners.”

Banking and Insurance:

[Bank Customer Experience Summit](#)

Where: Chicago, IL

When: September 12th-14th, 2018

Focus: Taking a Marketplace Approach to Banking.

Why it's on our list: You'll be able to learn and pass on information to your clients about new developments in next generation ATMs, digital banking and mobile payments, giving you a leg up on getting more millennial clients. Get some great talking points and stand out at this conference mainly focussed on banking customer experience.

Blurb: “Businesses in a wide range of industries face specific pain points and banks realize this. A valuable opportunity exists for banks of all sizes to offer services to resolve these issues, but lacking technology and compliance concerns handcuff the financial industry from developing such solutions. For this reason, banks must deeply understand what innovation entails and what it means to remain compliant while offering new, innovative products and services. Financial institutions and fintech startups should also work together strategically, leveraging advancements in technology and data analytics, to deliver solutions that address and even anticipate the needs of their customers. By doing this, banks can empower the delivery of next-generation banking services, meeting market needs across multiple verticals and delivering concrete benefits to both businesses and consumers.”

[Connected Claims USA Summit](#)

Where: Chicago, IL

When: May 21st-22nd, 2018

Focus: Largest gathering of insurance claims executives for customer-centric claims processing.

Why it's on our list: Even if your interest is not in fraud detection and/or insurance claims, this conference will give you the opportunity to stand out as a financial industry pro among vendors and customers in this conference for insurance execs. You can also pick up on the knowledge and tools to discuss the importance of the insurance industry's age of disruption and help educate them on the tools to implement new technologies.

Blurb: “Meet and Exceed Customer Expectations: deliver a seamless, easy to use claims customer experience, incorporating dynamic customer communication across digital and traditional channels, utilising customer data to reduce duplication and increase claims resolution speed. Reduce Costs Through Efficient Processing: design strategies and implement technology and systems that streamline the claims process, from removing duplication to achieving greater accuracy at each stage, including damage assessment and repair estimates.”

Pick your conferences wisely and always consider which speakers, agendas, lead gen opportunities and knowledge

will benefit your niche the most. Happy registering!