THE WORLD’S NUMBER ONE AI EVENT FOR FINANCIAL SERVICES

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AI is already here. It’s happening in all industries; its application in business is growing fast. On many estimates, over the next 10 years, enterprise spending on AI technology will increase from $200m to over $60billion.

Financial services is the number one sector in terms of AI adoption (Tractica, Gartner, BoA) spearheading every industry in implementing AI across the board. AI is driving business growth, and rather than detract from human contribution, it is releasing workers to complete more creative and valuable tasks.

AI Business.com was founded in 2014 as the world’s first comprehensive news portal & online community dedicated to the advancement of Artificial intelligence and its impact on business. Bringing the community together face-to-face, we launched the world’s leading event Series on practical AI with flagship events in San Francisco, New York, London, Hong Kong and Cape Town.

The AI Finance Summit is the first exclusive, high-level conference to explore the impact of Artificial Intelligence on the financial services industry. Now in its 3rd Edition, it brings together business leaders from the world’s foremost banks, insurance companies, asset management organisations, brokers.

The event is made possible through the support of some of the world’s foremost innovators in this space, including our headline sponsors HCL, PwC, SapientRazorfish, Intel and NVIDIA.

The event takes place under Chatham House rules and features world-class Speakers presenting exclusive case studies shedding light into how the 4th industrial revolution is affecting the financial services industry.

We hope you thoroughly enjoy the world’s premiere event on AI for financial services, and put AI to work with great success!

George Kipouros
Co-Founder
AI Business
The AI Summit
george@aibusiness.com

Daniel Pitchford
Co-Founder
AI Business
The AI Summit
daniel@aibusiness.com
Opening Remarks and Conference Welcome
The Grand Ballroom, Baur Au Lac
Conference Chair Prof. Dr. habil. Jana Koehler, Lucerne University of Applied Sciences & Arts
George Kipouros, Director, AI Business

AI at UBS: Learning from the past 18 months
Annika Schröder, AI Program Lead, Group Innovation, UBS Group

Becoming Cognitive: How to Transform Your Business
Rashed Haq, Global Lead for Artificial Intelligence and VP, Sapient Consulting

Predicting the disruption
Steven Hedges, Interim Group CIO for AI and Robotics, Deutsche Bank

What can AI achieve today? Heuristics for assessing feasibility of projects
Adam Grzywaczewski, Deep Learning Solution Architect, NVIDIA

The segregation of duties for data science & Machine Learning teams in banks
Thomas Jensen, Head of AI and Machine Learning, Nordea Bank

The emerging AI Revolution
Christian B. Westermann, Partner, PwC

How AI drives customer expectations
Stefan Jeker, Head of Raiffeisen RAI Lab, Raiffeisen

When artificial becomes human – the unexpected impact of robots
Patrick Hunger, Chief Executive Officer, Saxo Bank

Intelligent Emotion Recognition Systems in Business Relations
Charbel Fakhry, AI Specialist & Data Scientist, Credit Agricole

Accelerate AI with a Data Pipeline Strategy
Brian Gold, R&D Director, Pure Storage

Machine Learning and Robotics in Financial and Regulatory Reporting
Ksenia Wahrler, Lead Architect Group Finance IT Department, Credit Suisse

AI and machine learning in financial services: the FSB Report
Jon Frost, Member of the Secretariat, Financial Stability Board

Making AI Walk The Talk
Jegannathan (Jegan) Kannan, Global Solutions and Practice Leader, HCL DRYiCE

Insights from using AI Language technology and Machine Learning in Credit Risk Modeling
Antony Elliott, Group Head of Business Transformation, Zurich Insurance Group

The 3rd wave of AI is here. It is time to ride it
Gayle Sheppard, Vice President, New Technology Group, General Manager, Saffron AI Group, Intel Corporation

AI in Banks
Laura Li Puma, Head of Big Data and IoT Office, Innovation Center, Intesa Sanpaolo

How AI will transform Transaction Banking
Parth Desai, Founder & CEO, Pelican

Building artificially intelligent tools to support the investment management process - vision, learnings, outlook
Nils Rode, Chief Investment Officer, Schroder Adveq

Algorithmic intelligence at the point of contact with the customer
Felix Niederer, Chief Executive Officer, True Wealth AG

Closing keynote: Market Design meets Machine Learning
Prof. Sven Seuken, Computation and Economics, University of Zurich

Chair’s Closing Remarks
Luminoso is a text analytics enterprise software company that empowers Fortune 100 companies to understand their customers’ feedback and take action to maximize customer satisfaction and loyalty. Luminoso applies cutting-edge methodologies, initially developed at the MIT Media Lab, to rapidly process and measure large amounts of consumer feedback from sources like online reviews, social media, call center transcripts. The intuitive user interface makes it easy for analysts and executives alike to identify key topics, track trends over time, and create dashboards to disseminate insights across the organization. Multilingual capabilities, including Chinese, Spanish, and Arabic, give global companies the ability to understand their customers worldwide. Clients include Autodesk, Staples, Target Australia, Publicis, Sapient, and Scotts. Luminoso is privately held with headquarters in Cambridge, MA.

SapientRazorfish, part of Publicis Sapient, is a new breed of transformation partner designed to help companies reimagine their business through radical customer-centricity. With more than 12,000 people and 70 offices around the globe, our capabilities span growth and business model strategy, new product and service innovation, enterprise digital transformation, IT modernization, omni-channel commerce, customer experience strategy, change management, digital operations, digital innovation, data strategy and advanced analytics. Recognized as a leader in the Gartner 2017 Magic Quadrant for Insight Engines and other analysts’ reports, Sinequa provides a cognitive search and analytics platform for Fortune Global 2000 companies and government agencies. Using advanced Natural Language Processing (NLP) and Machine Learning algorithms, the solution offers insights extracted from structured and unstructured data. Millions of users in the world’s largest and most information-intensive organizations, including Airbus, AstraZeneca, Atos, Rogers, UCB, Credit Agricole, Groupama, Mérieux, and Siemens, rely on Sinequa to put business-critical information at the fingertips of their employees. Sinequa develops its expertise and its business around the world with a broad network of technology and business partners. Sinequa is a founding sponsor of the Cognitive Computing Consortium. For more information, www.sinequa.com.

At Percl, our purpose is to build trust in society and solve important problems. We’re a network of firms in 157 countries with more than 223,000 people, committed to delivering quality in assurance, advisory and tax services. PwC advises on how best to integrate artificial intelligence into business strategy, to deliver new insights and extraordinary results. We help businesses create responsible AI strategies and are working with regulators and with industry to set out how to accelerate adoption whilst maintaining trust and transparency. We provide robust, broad and deep machine learning and AI expertise and have delivered AI solutions across industries, technical domains and business problems around the world.

Microsoft (Nasdaq "MSFT" (microsoft)) is the leading platform and productivity company for the mobile-first, cloud-first world, and its mission is to empower every person and every organization on the planet to achieve more.

NVIDIA awakened the world to computer graphics when it invented the GPU in 1995. Researchers use GPUs to advance the frontiers of science with high performance computing. Industry and academia leverage them for deep learning to make groundbreaking improvements across a variety of applications including image classification, video analytics and speech recognition. GPUs perform many calculations at once, speeding up processes that could otherwise take a year or more to just weeks or days.

Pelican has pioneered the practical application of Artificial Technology for over twenty years. Pelican provides banks and corporations with solutions that enhance, streamline and secure the payments lifecycle, partnering with customers to deliver innovative and agile solutions and drive growth.

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DreamQuark is a text analytics enterprise software company that empowers Fortune 100 companies to understand their customers’ feedback and take action to maximize customer satisfaction and loyalty. Luminoso applies cutting-edge methodologies, initially developed at the MIT Media Lab, to rapidly process and measure large amounts of consumer feedback from sources like online reviews, social media, call center transcripts. The intuitive user interface makes it easy for analysts and executives alike to identify key topics, track trends over time, and create dashboards to disseminate insights across the organization. Multilingual capabilities, including Chinese, Spanish, and Arabic, give global companies the ability to understand their customers worldwide. Clients include Autodesk, Staples, Target Australia, Publicis, Sapient, and Scotts. Luminoso is privately held with headquarters in Cambridge, MA.

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Now in its 3rd year, the first-ever global event to look at the impact of AI in Business, The AI Summit, is coming back and scaling up at the ExCel Exhibition Center with 10,000 expo visitors, 3,000 conference delegates, 200 speakers…

The event is the highlight AI Show during London Tech Week, supported by Mayor of London and the UK Government – expect a world-class festival highlighting innovation, excellence and critical thinking on AI for business. Our acclaimed speaker & audience is a who’s who list of senior decision-makers from across the board: CIOs, CTOs, CDOs, Chief Digital Officers, Heads of Innovation, Strategy, Transformation are some of the experts you’ll engage with at The AI Summit!

We are now looking for the most exciting, newsworthy case studies from leading organisations strategizing, implementing and measuring success of their AI projects. We ask our speakers to prepare and deliver inspirational, engaging and practical sessions that will help our delegates make significant progress with their AI investments, address challenges and gear up for future projects.

To submit your proposal please email Programme Curator George Kipouros (george@aibusiness.com) with an outline of the topic you wish to cover, highlighting the pivotal themes you are looking to address, the speaker details including a mini bio.

THE CALL CLOSES ON FRIDAY 8TH DECEMBER 2017!

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SPEAKERS

**Salvador Vidal**
*Head of Marketing & Client Experience*
**BNP Paribas Wealth Management**

Salvador is passionate about Marketing. He’s actively participating in making that field evolve into a complex, multi-disciplines, metrics-driven function with a direct bottom-line impact. Salvador has a demonstrated history of working in the wealth management industry. As a Client Experience evangelist and speaker, he’s currently involved into making private banking more digital and mobile. When he’s not doing that, he likes to take pictures of things he considers extensively and/or being involved in some activity connected to football.

**Charbel Fakhry**
*AI Specialist & Data Scientist*
**Credit Agricole**

Charbel is a Computer Engineer (B.Eng) with a Master’s degree in Artificial Intelligence from the University of Paris VI (LIPLP – Sorbonne Universitedaily). With 3 years of experience, he has worked on many innovative projects in Machine Deep Learning and Artificial Intelligence including an intelligent emotion recognition system through speech and face detection, a prototype classifier for a collaborative e-meeting platform, a multilingual speech recognition & machine translator for smartwatch through a word sense disambiguation model. Residing in Paris, Charbel is currently working as an AI Specialist and Data Scientist at Ménès (https://menes.fr), in collaboration with the Innovation center of Credit Agricole, one of the largest bank institutions in France (https://www.credi-agricole.com/en/).

**Jon Frost**
*Member of the Secretariat*
**Financial Stability Board**

Jon Frost is a Member of the Secretariat at the Financial Stability Board. In this role, Jon coordinates the monitoring of FinTech and contributes to the FSB’s systemic risk assessments. He supports the Standing Committee on Assessment of Vulnerabilities (SCAV) and the FSB Financial Innovation Network (FIN). He has contributed to analyses of FinTech credit, regulatory and supervisory issues around FinTech (report to the G20 Leaders’ Summit), and artificial intelligence and machine learning in financial services. Jon is seconded to the FSB from the Financial Stability Division in the Dutch central bank (DNB). Previously, he worked at various times in the private sector in Germany, in the U.S. and the U.K. National. He holds an MA degree in economics from the University of Bonn, Germany, and a PhD in economics from the University of Groningen, the Netherlands. More information about newly released FinTech publications and other news, you can sign-up for e-mail alerts at www.fsbo.org/newsalert and follow the FSB on Twitter: @FSBtoday.

**Laura LiPuma**
*Head of Big Data and IoT Office*
**Intesa Sanpaolo**

Laura has been working with Intesa Sanpaolo since 2006 in the R&D department. She is currently responsible for Intesa Sanpaolo’s Big Data and IoT Office Innovation Center, a center of experts who monitor business evolution in their areas of expertise by identifying the threats and opportunities arising from new solutions, technological innovations and regulatory changes. In the last year, she has also been assessing AI with PoC in many areas related to the bank. The methodology used is an “incubator” for banking, insurance and other special interest areas: realizing feasibility studies, Proof of Technology and Proof of Concept and newCo... through collaboration with companies, start-ups, research centers and universities.

**Gayle Sheppard**
*Vice President, New Technology Group*
**Intel Corporation**

Gayle leads Saffron’s overall market vision, strategy and fundamental direction for growth inside Intel’s platforms and outside Intel directly with Global 1000 customers across software, energy, health care and life sciences, and an expanding market of more than 100 globally distributed systems that support the core financial and regulatory reporting provisions of the FSOx. Gayle was Vice President of MarketMile, LLC (now part of Red Hat, Inc.) where she led the development and launch of a Software as a Service business focused on delivering new procurement and spend management programs to American Express Corporate Purchasing Card Customers.

**Laura LiPuma**
*Head of Big Data and IoT Office*
**Intesa Sanpaolo**

From 2000 to 2006, Laura has worked in Telecom Italia Lab on the Mobile Value Added Service field during that period and obtained a master in telecommunications.

Laura has been working with Intesa Sanpaolo since 2006 in the R&D department. She is currently responsible for Intesa Sanpaolo’s Big Data and IoT Office Innovation Center, a center of experts who monitor business evolution in their areas of expertise by identifying the threats and opportunities arising from new solutions, technological innovations and regulatory changes. In the last year, she has also been assessing AI with PoC in many areas related to the bank. The methodology used is an “incubator” for banking, insurance and other special interest areas: realizing feasibility studies, Proof of Technology and Proof of Concept and newCo... through collaboration with companies, start-ups, research centers and universities.

**Laura LiPuma**
*Head of Big Data and IoT Office*
**Intesa Sanpaolo**

Dr. Laura Li Puma graduated from Computer Science at the University of Turin.

**Jana Koehler**
*Professor*
**Lucerne University of Applied Science and Art**

Prof. Dr. habil. Jana Koehler is professor of computer science at Lucerne University of Applied Sciences and Arts, Switzerland. Prior affiliations include the German Research Center for Artificial Intelligence (DFKI), the Universities of Leipzig (DE), Maryland (USA) and Freiburg (DE), Schäffler Elevations R&D, and the IBM Research Laboratory in Zurich.

Her teaching and research focuses on artificial intelligence, business process management, and software engineering and architecture. She currently conducts several industrial research projects with partners in the area of artificial intelligence. She is president of SIGAI, the Special Interest Group on Artificial Intelligence of the Swiss Informatics Society, was a contributor to the BPMN 2.0 and CMMI 1.0 standards, holds several patents and has an h-index of 37.

**Jegannathan Kannan**
*Global Solution and Practice Leader*
**HCL DRYiCE**

Jegannathan Kannan (a.k.a. Jegan) is HCL’s Global Solutions and Practice Leader for DRYiCE Cognitive Autonomics. A digital transformer and automation evangelist, Jegan brings together deep expertise and experience across automation, orchestration, cloud, analytics and business strategy to enable 21st CE enterprises realize the full potential of Digital. He is an experienced technology and enterprise transformation professional with rich experience in strategizing and executing automation for multiple global corporations. He has played a key role in setting up and scaling up automation in Business Process and IT Domains, to include cognitive and AI solutions. In the past, Jegan designed and implemented, and led cloud transformation, analytics, system integration, business transformation and IT infrastructure management services including several strategic engagements worth $100 million and above at organizations like Accenture and BM, and is an electronics and communication engineer with Masters in Business Administration.

**Laura LiPuma**
*Head of Big Data and IoT Office*
**Intesa Sanpaolo**

Laura has been working with Intesa Sanpaolo since 2006 in the R&D department. She is currently responsible for the architecture strategy across the enterprise, rather than data science ones, to quickly iterate and crack data use case such as underwriting, fraud, churn, marketing, corporate or asset management markets. François holds an MBA from INSEAD and an engineering degree from the Ecole Centrale de Nantes.

**Francois de Lescure**
*Chief Sales and Marketing Officer*
**DreamQuark**

Francois has worked 10 years in the field of sales and marketing, including the creation and leadership of the European sales team of software solutions in artificial intelligence at Nokia. This background has naturally led him to join DreamQuark, a startup based in France, scaling up artificial intelligence for insurance and banks. Its software enables business experts with data under-
Brian Gold is a co-founder of the FlashBlade product at Pure Storage. He led R&D Director at Pelican, where he was a deep learning solution architect at NVIDIA, where his primary responsibility is to support a wide range of customers in delivery of their deep learning solutions. Adam is an applied research scientist specializing in machine learning with a background in deep learning and system architecture. Previously, he was responsible for building the UK government’s machine learning capabilities while at Capgemini and worked in the Jaguar Land Rover Research Centre, where he was responsible for a variety of internal and external projects and contributed to the self-learning car portfolio.

With over twenty-five years of expertise in the practical application of Artificial Intelligence technology to payments and compliance, Parth has a thorough understanding of Payments, Anti-Money Laundering and Risk Management, and has worked in a wide range of industries. Under Parth’s leadership, Pelican has grown to become a global market-leading company, delivering outstanding efficiency and product innovation benefits for customers in over 55 countries, and processing more than one billion transactions every day. Parth has a Master’s degree in Artificial Intelligence from Georgia Tech, an MBA from INSEAD, France, and has participated in several senior management programs in Harvard Business School, Boston and INSEAD, France.

Nils Rode is the Chief Investment Officer of Schroder Adveq. Nils also leads the Schroder Adveq Management Committee and a member of the Investment Committee. Nils is also a member of Schroder Adveq’s Management Committee and the Schroder Adveq Management Committee and a member of the Investment Committee. Nils has over fifteen years of experience in data analytics and IT management. In his career he has managed a number of large-scale projects in the Financial Services Industry.

Christian B. Westermann is a Partner in PwC Switzerland – a team of R&D and modellers specialists based in Zurich, with hands-on experience in Machine Learning, Deep Learning, Robotics, Natural Language Processing, Process Intelligence, IoT, Customer Analytics and Simulation & Modelling.

Over the last 20 years, Rashed has helped companies transform and create sustainable competitive advantage through innovative applications of artificial intelligence, dynamic optimization, advanced analytics and data engineering. Prior to joining Sapien, Rashed did research in theoretical physics at the Los Alamos National Lab and the Institute for Theoretical Science. His seminal paper on electromagnetically induced transparency led to the emerging cladding technologies.
SPEAKERS

Felix Niederer
Chief Executive Officer
True Wealth AG

In 2013, Felix Niederer, together with his business partner Oliver Hering, founded True Wealth. After almost two years of development the digital wealth management platform went live in October 2014. Before that, Felix Niederer worked as a quantitative portfolio manager with LGT Capital Partners, where he was responsible for several quantitatively managed investment funds. Prior to that, he worked as a credit portfolio manager with Swiss Re, where he had 17 years of experience as well as cost of credit transactions. He studied at ETH Zurich and EPFL Lausanne and has a M.Sc. in Physics from ETH. He has two children and lives in Zurich.

Annika Schröder
AI Program Lead, Group Innovation
UBS Group

Annika Schröder is a Director at UBS Group Innovation since July 2015. Within this role she delivers commercial, IT tax and strategic assessments across all UBS divisions and drives development in key areas such as Artificial Intelligence. Prior to working with UBS, she was Head of Strategy & Innovation at DB Investment Services GmbH in Germany, which bundles securities processing within Deutsche Bank, as well as its prior entities Xchanging Transaction Bank and Fondsdepot Bank. Before moving into Banking Innovation, Annika Schröder worked in Investment Banking functions at Lazard and other banks in London, advising Financial Institutions across the German-speaking region, Scandinavia, France and Eastern Europe in M&A, restructuring and IPD situations.

Riccardo Pianeti
Vice President and Portfolio Engineer
Undisclosed Wealth Management Company

Riccardo Pianeti is a Portfolio Engineer (Vice President) at a global Wealth Management company. Based in Geneva, he is responsible for providing innovative Quantitative Portfolio Solutions to platinum EMA private clients (>500MM Net worth). His team is one of the key stakeholders in the company endeavor to deliver advice to clients in digital format, while also promoting the use of data to inform sensor management strategic decision making. In his current tenure, he developed the company Recommender System (based on a proprietary AI algo) for systematic identification of Cross-Sell Opportunities within the Client Book. He holds a PhD in Financial Econometrics from the University of Bern, Switzerland, and a BSc in Economics from the University of York and is a Fellow of the Chartered Accountants in England and Wales. He has worked in the insurance industry since 1999 and for Zurich since 2005, in various roles, responsible for risk and portfolio modelling as well as costing of credit transactions. He worked as a credit portfolio manager with Swiss Re, where he had 17 years of experience as well as cost of credit transactions. He studied at ETH Zurich and EPFL Lausanne and has a M.Sc. in Physics from ETH. He has two children and lives in Zurich.

Sven Seuken
Professor
University of Zurich

Sven Seuken is a tenured Associate Professor of Computation and Economics at the University of Zurich. His research lies at the intersection of Computer Science, Artificial Intelligence, and Microeconomics/Game Theory, with a focus on (electronic) market design. He received his PhD in Computer Science at Harvard University. Since joining the University of Zurich in 2011 he has received multiple awards and research grants, including three grants from the SNF and a Google Faculty Research Award. He is also interested in practical applications of market design; he is the Chief Economist at Band Protocol, a US-based startup in the blockchain industry, which he has advised on market design topics since 2013. In 2017, he co-founded a Swiss start-up in the legal tech sector, where he is also in charge of market design.

Antony Elliott
Group Head of Business Transformation
Zurich Insurance Group

Antony stands for delivering customer centric, efficient and effective solutions and propositions for retail and commercial insurance customers. He believes that as Peter Drucker said culture eats strategy for breakfast, and that in the insurance industry we need to embrace a Team start up like innovative culture to drive meaningful transformation across the industry. He is the Zurich Group Head of Business Transformation. In this role he is responsible to drive the group’s efforts to make us more customer centric, efficient and effective. He has worked in the insurance industry since 1999 and for Zurich since 2006. In his career Antony has played a variety of roles within operations including program management, enterprise architecture and innovation involving projects in Latin America, the Middle East and Europe. Antony has a Bsc in Economics from the University of York and is a Fellow of the Chartered Accountants in England and Wales.

Christophe Chazot
Author, Former Global Head of Innovation at HSBC, currently in sabbatical

Christophe Chazot is on sabbatical leave until February 2018 to pursue the writing of his book on the future of banking. Until April 2017 he was the Group Head of Innovation for HSBC. He led Strategic Innovation Investment, was responsible for investing in disruptive companies; Innovation Strategy, for identifying and analysing themes that were key to HSBC’s future, and for the Innovation Centre which organises internal initiatives including incubation. Christophe has over 20 years experience across all the major asset classes in Capital Markets. He joined HSBC in 2003 as Global Head of Equity Derivatives. He was promoted to Co-Head of Global Equities in 2008 and was made a member of the Global Markets Executive Committee in the same year. In 2012, he became Head of Strategy and Planning for Global Banking and Markets. Prior to joining HSBC, he worked at Dresdner Kleinwort as the Global Head of Equity Derivatives; at Bankers Trust as the Global Head of Foreign Exchange Options; and at Barclays de Zoete Wedd as an interest rates swaps trader.

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