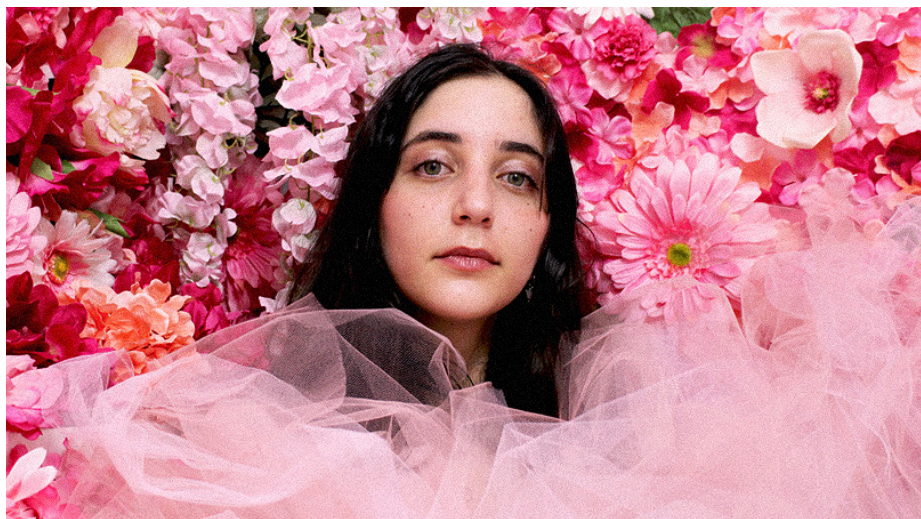




WEALTHTECH BOULDER

WealthTech Boulder is a group that was founded as a “Davos of WealthTech.”

Its aim is to bring together a like-minded group of WealthTech investors, innovators and strategic partners and look to the future and solve big problems in the space and build connections to help implement the solutions.



OUR AGENDA



Thu 6th.

Fri 7th.

Sat 8th.



Thu 6th.

18:00 - 23:00

Opening Reception - Corrida

With a nod to the Donostia group origins, Corrida is an excellent Spanish-Basque themed restaurant with an outstanding wine selection, innovative menu and spectacular roof-top views of the mountains unparalleled in Boulder. Drinks at 6. Dinner at 7.



Fri 7th.

08:00 - 09:00

Coffee, Breakfast and Mingling

We open with breakfast at the St. Julien. We'll have an hour to meet and greet before opening the event.

09:00 - 12:30

FRIDAY MORNING SESSIONS - Intros All Around and New Company Founder Deep Dives

During the Friday morning sessions we'll first talk about the ground rules of the event, have everyone introduce themselves and then leave space for the new company founders to talk about the big problems they are solving and their key challenges.

09:00 - 09:30

Welcome and Event Overview

Opening introduction to WealthFront Boulder. We review our overall goals and focus, the structure of the event, process and logistics. [Jeff Cruttenden](#) - The Treasury, [Bruno del Ama](#) - FinRebel, [Vinay Nair](#) - TIFIN, [Jim Wiandt](#) - Spark Network.

09:30 - 10:00

Introductions of All Attendees

We go around the group with each person talking about who they are and what they do, what gets them out of bed and excited in the morning and one thing people might not know about them.

10:00 - 10:45

New Founder Intros

Each of these 3 founders gives a 10 minute overview of their companies. Each is a 10 minute presentation followed by 5 minutes of Q&A. [Jesse Randall](#) - Sweater, [Louis Retief](#) - Hubly, [Deborah Yang](#) - Daizy.

10:45 - 11:15

Morning Networking Break

Grab a coffee, check a couple of emails and most importantly touch base with some of the new folks you've been introduced to in the morning sessions...

- 11:15 - 12:00 **WeathTech Taxonomy - 2 Perspectives**
Two founders provide 2 different perspectives of how to think of the WeathTech space.
[Jeff Cruttenden](#) - Treasury, [Vinay Nair](#) - TIFIN.
- 12:00 - 12:30 **Big Topics Preview**
In our agenda we have big topics that we're covering: Customized Platforms Focused Downstream, Blockchain and tokenization and Investment Process in a Tech Forward World. Do these align with attendees core interests? What are we missing.
[Jim Wiandt](#) - Spark Network.
- 12:30 - 13:45 **Working Lunch at St. Julien**
We'll stay on site at the St. Julien for our lunch.
- 14:00 - 17:00 **FRIDAY AFTERNOON SESSIONS - Big Topics in WealthTech**
These sessions focus on wrestling with some of the big issues confronting WealthTech. The idea is to get beyond selling/ describing mode and work together as a group to break some entrenched biases and get our hands around these big issues.
- 14:00 - 14:15 **Fireside Palette Cleanser with Nic Harcourt**
Nic Harcourt is a cultural icon and in the course of his career has interviewed everyone who is anyone in Rock and Roll and played a key role in introducing some of the biggest Rock and Roll names to the world through his LA DJ work.
[Jim Wiandt](#) - Spark Network, [Nic Harcourt](#) - Spark Network.
- 14:15 - 15:00 **Big Topic #1: Digital Investing Platforms and Customized Solutions**
This open discussion session with focus on direct connection to retail investors with customized solutions. The discussion will be moderated by the founders themselves.
[Jeff Cruttenden](#) - The Treasury, [Bruno del Ama](#) - FinRebel, [Jennifer Grancio](#)- Engine No.1, [Deborah Yang](#) - Daizy.
- 15:00 - 15:45 **Big Topic #2: The Coming Blockchain Revolution in Asset Management - from Tokenization to Trading**
One thing everyone can agree on is that there is likely to be a revolution in efficiency driven by blockchain technology that will ultimately transform asset management. What could that look like and which dominoes need to fall for it to happen?
[Bruno del Ama](#) - FinRebel, [Som Seif](#) - Purpose Investments .
- 15:45 - 16:15 **Afternoon Networking Break**
One last chance before dinner at Vinay's to catch up on a couple emails, have a cup of coffee and make a couple other connections.
- 16:15 - 17:00 **Big Topic #3: Thinking Way WAY Outside the Box**
An artist, engineer, entrepreneur. Jonty Hurwitz comes from a place that fundamentally is outside the box. We discuss with Jonty and the group how to find the mindset to see which radical changes in WealthTech could completely revolutionize the space. [Jonty Hurwitz](#)- Daizy.
- 16:30 - 17:00 **Debrief, Unwind and Set up Saturday Discussions**
We'll summarize the day's discussions and set up for what we'll focus on for Saturday. With this buffer session, our aim is to wrap up at 5 and be on the bus over to Vinay's house at 5:30 pm. for drinks and a sunset viewing.
- 17:50 - 22:00 **Dinner Chez Vinay with Guest Artist Dafna**
Friday dinner will be graciously hosted by Vinay Nair at his home with a world class catered meal sourced locally and a musical performance by Dafna. We'll depart from the hotel at 5:30 p.m. to enjoy the sunset at Vinay's.



Sat 8th.

- 09:00 - 10:00 **9:00 a.m. Breakfast**
Merciful breakfast time, with sessions beginning at 10 a.m.
- 10:00 - 12:30 **SATURDAY MORNING SESSIONS - Step Back, Reflect, Dive Back In, Summarize**
Saturday morning gives us a chance to really look at things from outside the box and then to decide where we'd really like to dive back in for substantive discussion before summarizing our discussions and preparing for the hike.
- 10:00 - 10:45 **Big Topic #4: Investment Process in a Tech Forward World**
With the drive toward highly scaled customization aimed at downstream customers, the quality thinking of old school asset allocation should not be lost in a black box, but refined and customized in ways that build strength onto strength.
[Jeff Cruttenden](#) - The Treasury, [Bruno del Ama](#) - FinRebel, [Deborah Yang](#) - Daizy.

10:45 - 12:30

Deep Dive Grab Bag Attendee Topics

We'll begin or continue a discussion based on topics that we managed to come up with after a day of sessions with a vote from the group!

Bruno del Ama - FinRebel, **Som Seif** - Purpose Investments, **Jim Wiandt** - Spark Network.

12:30 - 13:00

Summarizing, Clarifying, Takeaways

3D summary and logistical wrap-up.

13:00 - 14:00

Lunch at Jill's Restaurant and Bistro at the St. Julien

We'll end the discussion part of the event with a nice pre-hike lunch at Jill's Restaurant and Bistro in the St. Julien.

14:30 - 17:30

Rattlesnake Gulch Trail Hike

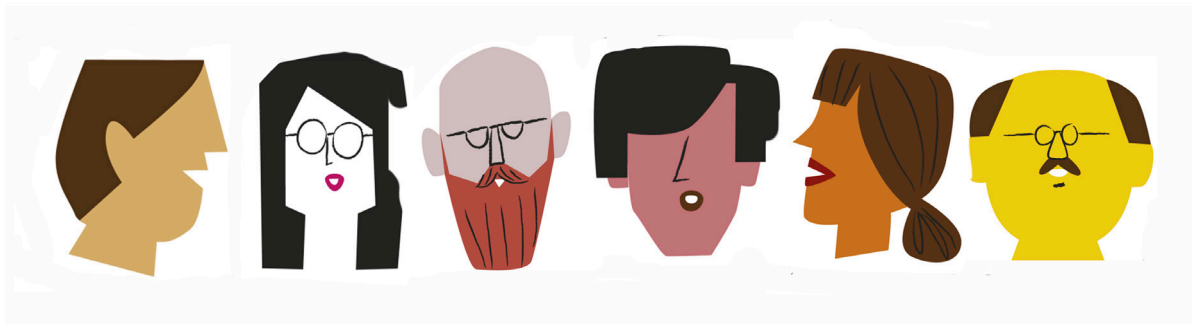
The trailhead leads to the south of the Eldorado Mountains. It includes spectacular rock formation and sweeping views and we'll aim to time the walk to enjoy a beautiful sunset before our dinner.

19:00 - 23:00

Closing Dinner at Frasca

In the private room at Frasca, Boulder's James Beard Foundation award-winning restaurant. Frasca works in the tradition of the Friuli-Venezia Giulia region in northeastern Italy with great Italian wines to match.

ATTENDEES



Anil Arora
TIFIN
President, Wealth, TIFIN

Nic Harcourt
SPARK NETWORK
Director of Culture

Louis Retief
HUBLY
Founder and CEO

Reggie Browne
GTS
Principal

Jonty Hurwitz
DAIZY
Founder

Som Seif
PURPOSE INVESTMENTS
Founder and CEO, Purpose Investments

Jeff Cruttenden
TREASURY
Founder

Chad Lewkowski
HUBLY
CoFounder, President and CIO

Jim Wiandt
SPARK NETWORK
CEO

Dafna
SELF
Singer Songwriter

Vinay Nair
TIFIN
FOUNDER & CEO

Deborah Yang
DAIZY
Cofounder and CEO of Daizy

Bruno del Ama
FINREBEL
Founder

Conor O'hAonghusa
SPARK NETWORK
COO

Jennifer Grancio
ENGINE NO.1
CEO

Jesse Randall
SWEATER
Founder and CEO

