

NEWS

For immediate release



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Incedo to Reveal Results of the Wealth Management Industry Data Readiness Survey at T3 Conference in Tampa

Success in digital transformation requires understanding the unique complexities of the wealth management data ecosystem

TAMPA, FL (March 13, 2023) – [Incedo, Inc.](#), a leading digital transformation consulting and technology solutions firm, will announce the results of the recent T3/Incedo Data Readiness survey at the [Tools and Technology for Today \(T3\) conference](#) during their scheduled session, Tuesday, March 14, 2023 at 9:25 a.m.. Incedo CEO Nitin Seth will talk about whether wealth management firms are ready to win in a Data-First World. Enterprise Track participants (broker/dealer, bank, insurance, custodian, TAMP, and other executives from leading financial services companies) will learn the results of the survey, which will help them understand the challenges across the data value chain and what firms need to do to maximize the value of data. The T3 conference, produced by fintech thought leader and practice management expert Joel Bruckenstein, is being held at the JW Marriott Water Street in Tampa Florida March 13 - 16, 2023.

“The wealth management industry is advancing in its digital efforts,” Seth explained. “However, it still lags other peer industries. This leads to suboptimal experiences for advisors and investors. Data is at the core of the digital transformation for the wealth management industry however the industry needs to address core data challenges such as data availability, data quality and tying data to business impact. This survey will assess the data maturity of the wealth management industry and expose areas that need further consideration and work.”

The survey, which involved the participation of over 40 data and business executives, including Chief Technology Officers, Chief Information Officers, and Chief Data Officers of large enterprise firms with combined AUM (assets under management) of \$1.5 trillion and over 30,000 advisors, assessed the industry’s maturity across key dimensions. In his T3 session, Seth will reveal:

- The biggest opportunity areas for firms to leverage data

- The key challenges firms face in their quest to get maximum value from data
- Changes wealth management firms need in insights generation and delivery to make analytics more effective
- Some of the use cases implemented by best-in-class firms in the industry to move KPIs

Seth will dive deeper into each of these areas with insights and implications, and what industry leaders are doing right, and what still needs to be improved. The session will provide recommendations about how leveraging data can improve client/advisor acquisition, client growth and maturity and operation efficiency.

In addition to the session, readers are encouraged to [obtain a copy of Seth's bestselling and award winning book, *Winning in the Digital Age*](#), a practical handbook for understanding and winning in the post-COVID digital age and becoming a 21st century leader. The first 50 to stop by the Incedo booth at T3 (#401-403) will get a personally signed copy. The book brings clarity to the transformation process, breaking down the seven key building blocks, and discusses the fundamental shifts needed to win in the digital age.

ABOUT INCEDO, INC.

Incedo, Inc. is a digital transformation expert empowering companies to realize sustainable business impact from their digital investments. Their integrated services and platforms that connect strategy and execution are built on the foundation of design, AI, data, and strong engineering capabilities blended with their deep domain expertise from digital natives.

With over 3,500 data and technology professionals in the US, Canada, Latin America, and India and a large, diverse portfolio of long-term, Fortune 500 and fast-growing clients worldwide, Incedo works across financial services, telecom, product engineering, and life sciences industries. Visit their website to learn more about how they help clients transform today: IncedoInc.com.

ABOUT NITIN SETH

Nitin Seth is an accomplished industry leader with a unique combination of experiences as a global manager, entrepreneur, and management consultant. Seth is the Chief Executive Officer of [Incedo, Inc.](#), a firm focused on digital transformation and analytics. Prior to Incedo, Seth held several top management positions. He was Chief Operating Officer of Flipkart, India's largest e-commerce company; Managing Director and Country Head for Fidelity International in India where he also led Global Offshore Operations and Business Strategy for Fidelity's International business; and Director of McKinsey's Global Knowledge Centre in India, where he developed multiple new knowledge and analytics-based capabilities that has far reaching industry impact. He is the author of the bestselling book *Winning in the Digital Age*, which has won 5 best business book awards globally.

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