



EVENT ORGANIZED BY **L'AGEFI**

- 4th edition -

APPLICATION FORM

AM TECH DAY AWARDS 2019

- 4th edition -

PRACTICAL INFORMATION

All companies active in Europe in the area of asset management (asset management companies, private banks, insurance companies, family officers, wealth management advisors, fintechs, software providers etc.) are eligible to apply for the AM TECH DAY AWARDS. To compete, the participating company should tick the box or boxes corresponding to the award(s) for which they would like to compete (at the top of the page next to the title). They should then fill in the pages associated with the award concerned within the application form. For each award for which they are competing, the participating company can attach a PowerPoint of a maximum of 4 slides or a video of a maximum of 3 minutes. Illustration using a video or providing a Demo code is mandatory for the Best customer experience award. The panel will pay attention to the **level of detail and clarity** in putting together the application.

The application form should be returned no later than Friday 19 July 2019 to: spintaud@agefi.fr, or by post to L'AGEFI for the attention of Ségolène PINTAUD, 102-116, rue Victor Hugo, 92300 Levallois-Perret.

For information, contact Ségolène PINTAUD: +33 (0)1 41 27 47 16

ABOUT THE APPLICANT COMPANY (for billing) :

Company:

Address:.....

Post code:.....

City:.....

PERSON RESPONSIBLE FOR THE PROJECT:

First name:

Name:

Position:

Telephone:

Email:

present _____ application form (s) in the following categories (maximum 3 files per category):

- **Best customer experience award.**

Number of form(s): _____

- **Finchallenge award for most innovative open innovation project of the year.**

Number of form(s): _____

- **Award for most innovative start-up of the year (less than 5 years old).**

Number of form(s): _____

- **European fintech award – Best international development.**

Number of form(s): _____

- **Award for most innovative technological solution of the year.**

Number of form(s): _____

- **Award for best investment process-improving initiative.**

Number of form(s): _____

- **Award for best environmentally-friendly initiative.**

Number of form(s): _____

In order to validate my candidature, I make a payment of _____ x € 708 including tax . * = _____ euros including tax

(* unit rate per file presented – €590 excluding tax or €708 including tax) by bank check payable to the AGEFI attached to this registration form

Done in _____, Date _____

Company stamp and signature:



BEST CUSTOMER EXPERIENCE AWARD 1/2

Please tick

Criteria	(500 characters maximum per item) – Responses
Do you have a multichannel offering?	
Describe the experience (must be illustrated by video or using screenshots or providing a Demo code)	
What makes it a high quality experience?	
What are the criteria used to assess the level of quality? Give examples	
How has the quality of the service been validated? Has a satisfaction survey been carried out? What are the results?	
How many customers do you have and of what type?	

BEST CUSTOMER EXPERIENCE AWARD 2/2

Criteria	(500 characters maximum per item) – Responses
How did you know what your customers were looking for?	
How is your customer experience updated on the basis of customer feedback? Do you use innovative technologies to adapt to changing user practices?	



FINCHALLENGE AWARD FOR MOST INNOVATIVE "OPEN INNOVATION" PROJECT OF THE YEAR 1/3

Please tick

Collaborative project between a fintech and conventional operator active within the asset management sector (asset management company, distributor, insurance company, mutual society, pension fund, private bank, family officer, wealth management advisor etc.)

Information about the applicant company	Information about the partner company for the project
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<p>Company name:</p> <p>Address:</p> <p>Profile (fintech, asset management company, distributor, insurance company, mutual society, pension fund, private bank, family officer, wealth management advisor or other to be specified):</p>	<p>Company name:</p> <p>Address:</p> <p>Profile (fintech, asset management company, distributor, insurance company, mutual society, pension fund, private bank, family officer, wealth management advisor or other to be specified):</p>
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NB: oral presentations will be organised for the three Finchallenge finalists at AM TECH DAY on 8 October.

FINCHALLENGE AWARD FOR MOST INNOVATIVE “OPEN INNOVATION” PROJECT OF THE YEAR 2/3

Collaborative project between a fintech and conventional operator active within the asset management sector (asset management company, distributor, insurance company, mutual society, pension fund, private bank, family officer, wealth management advisor etc.)

Criteria	(500 characters maximum per item)
What major theme does your project relate to (customer experience, risk and compliance, market infrastructure etc.)?	
Within this framework, have you needed to create a company or platform or enter into a business agreement concerning development and/or distribution? In what year?	
What issue did you want to address?	
What was your strategy? What obstacles have you encountered and what solutions were found?	
How many people have worked on this project or how many employees are there if a company has been created?	

FINCHALLENGE AWARD FOR MOST INNOVATIVE “OPEN INNOVATION” PROJECT OF THE YEAR 3/3

Collaborative project between a fintech and conventional operator active within the asset management sector (asset management company, distributor, insurance company, mutual society, pension fund, private bank, family officer, wealth management advisor etc.)

Criteria	(500 characters maximum per item)
Has the solution already been brought to market? Give examples of implementation	
How does your solution differ from existing solutions?	

AWARD FOR MOST INNOVATIVE START-UP OF THE YEAR 1/2

(less than 5 years old)

Please tick

Description:

(2,500 characters maximum)

AWARD FOR MOST INNOVATIVE START-UP OF THE YEAR 2/2

(less than 5 years old)

Criteria	(500 characters maximum per item)
Target market	
Disruptive aspect of start-up (if possible, illustrate using a video, screenshots or by providing a Demo code)	
Aims/results achieved relative to business plan	

Option of including a video showing what you do (2-3 minutes)



EUROPEAN FINTECH AWARD

Best international development 1/1

Please tick

Criteria	(500 characters maximum per item) – Responses
Can you describe your purpose and international development strategy?	
What are your aims (revenue growth, target countries etc.)?	
What resources have been implemented to pursue this strategy? What changes have you had to make at the level of your solution to win new markets? What obstacles have you had to overcome?	
What results have been achieved?	



Please tick

AWARD FOR MOST INNOVATIVE TECHNOLOGICAL SOLUTION OF THE YEAR 1/3

This concerns (tick box):

	Launch of product or solution
	Innovation concerning an existing product or solution

Presentation of product or innovation concerning an existing product (2,500 characters maximum)
If possible, illustrating using a video, screenshots or by providing a Demo code

AWARD FOR MOST INNOVATIVE TECHNOLOGICAL SOLUTION OF THE YEAR 2/3

Criteria	(500 characters maximum per item)
Target market	
Organisational structure in place to manage innovation	
Time devoted to innovation	
Disruptive aspect of product or solution	

AWARD FOR MOST INNOVATIVE TECHNOLOGICAL SOLUTION OF THE YEAR 3/3

Criteria	(500 characters maximum per item)
Type of technology used	
Target/actual results	
Added value of product or solution	



AWARD FOR BEST INVESTMENT PROCESS - IMPROVING INITIATIVE 1/1

Please tick

AI or blockchain-type technological innovations applied to certain asset classes before selecting stocks with a view to improving alpha generation or encouraging investment in crypto-assets etc.

Criteria	(500 characters maximum per item)
Can you describe your strategy and aims?	
What technology is used?	
What are the KPIs identified and pursued?	
What results have been achieved?	



AWARD FOR BEST ENVIRONMENTALLY-FRIENDLY INITIATIVE

Please tick

1/2

Criteria	(500 characters maximum per item)
Can you define your purpose?	
How do you take account of the human impact of what you do on an internal level (developing staff's knowledge of integrating innovative technologies, training, management of relationships between in-house staff and fintech service providers or software/solutions suppliers etc.)?	
How do you take account of the human impact of what you do on your customers (place of people in the customer relationship)?	
How do you demonstrate transparency relative to how you use your customers' data?	
What guarantees do you give your customers concerning protection of their data? What is your procedure/organisational structure as regards cyber-security?	

AWARD FOR BEST ENVIRONMENTALLY-FRIENDLY INITIATIVE 2/2

Criteria	(500 characters maximum per item)
Has your company's digital transformation and/or use of innovative technologies had a positive impact on the environment (reducing consumption of paper, electricity, transportation etc.) ? How do you measure this impact in the short and long term?	
Has your company's digital transformation and/or use of innovative technologies had a positive impact on society (creating jobs, changes to governance, taking account of gender equality and diversity etc.)?	
How do you measure this impact on society in the short and long term?	

APPENDICES

Optional

Documents provided:

You may attach a PowerPoint consisting of a maximum of four slides for each award for which you are applying or a video of a maximum of 3 minutes.

No additional appendices will be accepted.

Number of PowerPoints attached (1 maximum per award) or a video of a maximum of 3 minutes.

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