

Claude Diderich

Managing Director and Owner at innovate.d llc

Richterswil, ZH, CH

Dynamic, engaging speaker, with proven didactical capabilities

Biography

Dr. Claude Diderich, CEFA, FRM, NPDP has more than 20 years of experience in strategy development, product innovation and investment process design, with special focus on institutional asset management and private banking. His expertise spans from developing business and product strategies, managing product portfolios, through implementing process and technology improvements, including change management, communication and training.

Availability

Keynote, Moderator, Panelist, Workshop, Author Appearance, Corporate Training

Industry Expertise

Financial Services, Investment Management, Banking

Areas of Expertise

Innovating in Wealth Management, Investment Process Design, Wealth Management Business Strategy

Affiliations

International Society for Professional Innovation Management, Global Association for Risk Professionals, Product Development and Management Association

Sample Talks

Gaining Trust through Innovation in Wealth Management

Wealth management is about trust and delivering on promises. Successful wealth management products and solutions focus on managing the trust bank accounts of their clients. Forecasting markets and constructing risk optimized portfolios is no longer the only area of innovation. Wealth managers need to focus on all components of the investment management value chain to (re-)gain trust. Innovation is about teamwork putting the client to the forefront and transforming ideas into innovative products in which the client trusts and this is willing to pay an above market fee.

Turning Client Risk Profiling into Competitive Advantage

Successfully servicing wealth management clients requires an in-depth understanding of their needs with respect to return expectations but also with respect to their risk perception. The process of determining the client's risk tolerance is a key component of successfully advising clients. Best practice in determining the client's risk tolerance is using a psychometric questionnaire. The risk profiling spider model assesses the client's risk tolerance along the five dimensions, i) expectation bias, ii) anchoring, iii) loss frequency, iv) loss magnitude, and v) reactivity. The process of risk profiling can be turned into a competitive advantage by advising on solutions that match the client's risk profiling spider.

A Forward-Looking Technology Platform Architecture for Wealth Managers

Having a sound technology platform architecture in place is key to support today's investment management business. A forward-looking platform should separate business requirements from technology aspects. It should also encapsulate complexity and be flexible enough to allow changes in supported offerings and associated business processes to be implemented through configuration management rather than software releases. A three-layer application architecture composed of a i) business layer, ii) a functional layer encapsulating complexity, and iii) a service layer allows leveraging in a simple and efficient way services and data, fulfills these criteria.

Event Appearances

Title

Recent Developments & Emerging Best Practice in Wealth Management Regulation & Compliance Conference

Gaining trust through innovation

2nd ISPIIM Innovation for Financial Services Summit 2012

Risk management is more than Value-at-Risk

ETH RiskDay 2012

Education

Swiss Federal Institute of Technology - Lausanne

Theoretical Computer Science Dr es sciences

Swiss Federal Institute of Technology - Lausanne

Masters Computer Science Engineering

University of St. Gallen

Certificate of Advanced Studies Strategy

Testimonials

Michael Blum

Dr. Claude Diderich has exceptional analytical skills and the ability to simplify complex matter to a business practical degree. His ability to break down, present and transform challenging business situations is unique and warrants high value.

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